UNIVERSIDADE CATÓLICA PORTUGUESA

A marketing perspective on circular economy

Marketing incentives as a chain effect in the adoption of circular models

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Março de 2019

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Trabalho Final na modalidade de Dissertação
apresentado à Universidade Católica Portuguesa
para obtenção do grau de mestre em Marketing

por

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sob orientação de
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Católica Porto Business School
Março de 2019

Acknowledgments

À Professora Alexandra Leitão agradeço as suas preciosas sugestões e orientações assim como a sua disponibilidade.

Aos meus pais, à minha irmã e ao meu namorado agradeço o apoio e a paciência incondicional.

Dirijo um agradecimento especial à ASOS tal como à Orange Fiber pelo tempo e a informação disponibilizada.

A minha avó, por tudo.

Resumo

A indústria têxtil é a segunda mais poluente do planeta. Esta dissertação delineia uma visão para o setor, com benefícios de longo prazo quer para a economia quer para o ambiente através de marketing B2B e de como este pode promover a implementação de uma economia circular. Este estudo tem como objetivos de investigação tratar a lacuna identificada na literatura quanto a incentivos do marketing B2B na promoção de práticas sustentáveis, identificar as atividades chave na gestão de uma cadeia de aprovisionamento que se pretende verde, compreender a perceção dos consumidores dessas atividades B2B.

São duas as questões de investigação. A primeira é relativa ao papel do marketing B2B na adoção de modelos circulares. A segunda questão é relativa a como este influencia a educação e sensibilização do consumidor final.

A investigação realizou-se através de um estudo de caso comparativo tendo como protagonistas principais as empresas ASOS e Orange Fiber, uma reconhecida loja online e uma start-up italiana focada em agricultura regenerativa, respetivamente.

Este estudo comparativo permitiu concluir que colaborações entre marcas são um incentivo crucial para a adoção de modelos circulares, permitindo a partilha de informação e conhecimento, a criação de uma imagem de marca corporativa distintiva assim como um certificado de qualidade comum. Este processo de criação de incentivos divide-se em três passos: captura de valor em oportunidades proporcionadas pela economia circular, a criação de valor ao unir duas identidades de marca e a entrega de valor ambos ao consumidor final assim como as marcas envolvidas. As conclusões finais apontaram, igualmente, como o marketing verde em B2B promove conteúdo promocional educativo e informativo para o consumidor final.

Palavras-chave: B2B marketing, Cadeia de aprovisionamento verde, Associação de marcas, Economia circular, Moda sustentável

Abstract

The textile industry is classified as the second most polluting industry in the planet. This study outlines a vision for this sector based on delivering long-term benefits for both the economy and the environment through B2B marketing incentives to the adoption of a circular economy. The research objectives guiding this study aim to address the research gap regarding B2B marketing incentives fostering sustainable practices, to identify the key activities in Green Supply Chain Management (GSCM) as well as to understand consumer perception of those B2B activities.

The dissertation sets two research questions. The first research question is about the role of marketing as crucial in the adoption of circular models from a B2B perspective. The second one, inevitably, addresses how B2B marketing and partnerships may influence consumer education.

This research was conducted through a comparative case study featuring ASOS and Orange Fiber, an established, well-known online retailer and an Italian start-up building their business upon regenerative agriculture, respectively.

The comparative analysis concluded that collaborations between brands are a key marketing incentive, allowing them to jointly share know-how, establish a distinctive corporate brand image and create a common quality label. The process of creating marketing incentives is divided in three steps: value capturing in circular economy opportunities, value creation by merging two brands' identity and value delivery to both the brands and the consumers. The final conclusions of the study underline how green marketing in B2B fosters educational and informative marketing content for consumers.

Key words: B2B marketing, Green supply chain management, Co-branding, Circular economy, Sustainable fashion

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Abbreviations

ASOS – As Seen On Screen

B2B – Business-to-business

B2C – Business-to-consumer

B2B2C – Business-to-business-to-costumer

CE – Circular economy

CRM – Customer Relationship Management

EMAF – Ellen Macarthur Foundation

GFA – Global Fashion Agenda

GMCS – Genetically Modified Cotton Seeds

GSCM – Green Supply Chain Management

FTL Venture – Future Tech Lab

LCA – Life Cycle Assessment

SAC – Sustainable Apparel Coalition

SC – Supply chain

SCM – Supply chain management

SD – Sustainable development

SDG – Sustainable Development Goals

MDG - Millennium Development Goals

R&D – Research and Development

Chapter I

Introduction

1.1. Study's framework and objectives

This study attempts to provide key insights into the fashion market and its evolving commitment to circularity by answering two essential research questions. The first research question focuses on investigating how the role of marketing may be crucial in the adoption of circular models from a business-to-business (B2B) perspective. The previous research question inevitably gives rise to a second research question addressing how the subsequent impact of B2B marketing incentives and partnerships, influence the education and awareness of consumers. The extensive research and analysis previously completed of the existing literature, concluded that there were numerous studies conducted on green communication and the influence of green communication tools, such as labels on the final purchase behaviour. Unlike the business-to-consumer (B2C) sector, the B2B perspective remains under-researched, lacking in studies linking marketing activities with B2B collaborations for sustainability purposes. Consequently, the main research objectives may be listed as follows:

1) Address the current research gap regarding B2B marketing incentives fostering sustainable practices.
2) Identify the key activities and actors in green supply chain management (GSCM) in both the fast and slow fashion movements which allow the transition to circularity.
3) Understand how consumers perceive B2B activities and their intended image and message.

1.2. Contextualisation

According to the World Wildlife Fund's 2016 report about the current state of the Earth's natural resources, 1.6 planets would be necessary to satisfy humans' contemporary consumption patterns (WWF, 2016). By 2050, the organisation expects 2.3 planets will be needed if humanity does not shift to increasingly greener consumption habits. As such, there is an imminent need for permanent and consistent investment in a sustainable lifestyle and production system (Hoffmann and Hoffmann 2008). Sustainability and its related circular economy (CE) model are concepts tidily associated with economic growth as well as with social and environmental responsibility (Weiss et al., 2014). The transition to circularity, which is currently being promoted as ‘the sixth major wave of industrial innovation since the start of Industrial Revolution’ (Gardner and Prugh, 2008)[1] by influential governments such as those of Finland, China, Japan, the UK and the EU, would generate over €600 billion in annual economic gain for the EU alone (European commission report, 2014).

1.3. Study’s motivations

This study addresses the issues of sustainable development (SD) and a CE from a marketing perspective, investigating the role and influence of marketing activities between businesses in the adoption of circular models. The choice of industry is justified by the following reasons:

I. Classified as the second most polluting industry on the planet, the textile industry generates over 16 million tons of waste per year inducing valuable, reusable materials to be lost to landfills ignoring the remanufacturing potential of this waste (EC Report on the implementation of the Circular Economy Action Plan, 2017). The fashion industry’s excessive footprint is due to the its disproportionate use of water and hazardous chemicals and the increasing generation of textile waste (Siegle, 2016). Dying procedures of the textile industry, using over 40 million tons of chemicals yearly, are responsible for 20% of global industrial water pollution (Ellen Macarthur Foundation Report (EMAF), 2015). Additionally, the vast use of synthetic and genetically modified materials is highly bio-accumulative[2] and carcinogenic such that textile production threatens not only the environment but also human health (Riello, 2013).

[1] The second wave being The Age of Steam, followed by the Age of Electricity, The Age of Mass Production and the Age of Communications Technology and Networks (Moody and Nogrady, 2010).

[2] Bio-accumulative substances are defined as toxic chemicals assembling in a living organism faster than the later can excrete and metabolize them (EMAF, 2015).

II. Moreover, consumers' concerns about the unsustainable use of resources, climate change and social discrepancies have been increasing each decade causing their consumption patterns to slowly shift towards sustainable consumption options (Jain and Kaur, 2004). Whilst there has been a significant increase in the creation of eco-fashion brands, consumers' lack of awareness of these and their production policies limit the branding and marketing strategies of green fashion brands (Coleman and D'Souza, 2013). Although consumers are increasingly aware of the current state of the fashion industry, clothing production has doubled over the last 15 years due to a global growing middle-class and increased sales per capita (consult Annex I).

III. Lastly, various governmental and European programs have been created during the last decade to actively lessen the industrial impact of textile production on the environment. The Pulse of The Fashion Industry report estimates that a new textile economy could generate about €160 billion in 2030 (GFA report, 2018). Thus, the European Parliament has been providing guidance to the textile industry actors on how to effectively reduce the textile waste going to landfills. In addition, the EU's Framework Programme Horizon 2020 has invested €8.8 million into the RESYNTEX project, gathering 10 EU members to work on how to effectively implement industrial symbiosis[3] and develop innovative business models for the reprocessing of basic textile components. The chemical recycling process aims to increase resource efficiency and turn leftover waste into reusable, valuable industrial feedstock and secondary raw materials.

All in all, the circumstances mentioned suggest the necessity of a system wide change which has been, up to now, functioning with dangerous, future threatening gaps but also valuable opportunities. Firstly, there is a crucial gap in perceiving waste and the €82 million landfilled clothes as a costly and value-embedding resource (EMAF, 2015). Then, consumers' lack of education and

[3] The concept of industrial symbiosis is defined by the creation of partnerships aiming to provide, share and remanufacture resources such that each member may benefit from embedded value, otherwise lost in linear business models. It began in 1961, in Kalundborg (EMAF, 2018).

awareness of the impact of their consumption habits, is, equally, a barrier to an effective transition to circularity. Despite these gaps and barriers, governmental action plans have been enacted for municipalities and businesses, opening new opportunities for production and waste management.

1.4. The study's structure

The next chapter of the study clarifies the most relevant concepts and tools of sustainability in the textile market with the objective of understanding the current state of B2B branding literature, which is later compared and complemented with the comparative case study conducted. The third chapter justifies the choice of research method and introduces the brands which are studied in the comparative case study. The following chapter 4 addresses the purposed research questions by enumerating the marketing strategies in form of a comparative case study, promoting the adoption of circular models from a B2B perspective, identified through the interviews conducted. Chapter 5 presents the final consumer's perception of B2B marketing strategies through a perceptual map and the discussion held with a focus group.

Chapter II

Literature review

This chapter provides a synopsis of the main theoretical notions applicable under the scope of this study. Firstly, this chapter clarifies two concepts essential in the topic of sustainability: CE and SD. This literature review is divided into three interconnected pillars, as illustrated as follows: the rise of the various fashion streams, the subsequent logistical management needed to commit to circularity and the communication strategy both preceding pillars offer in a B2B context.

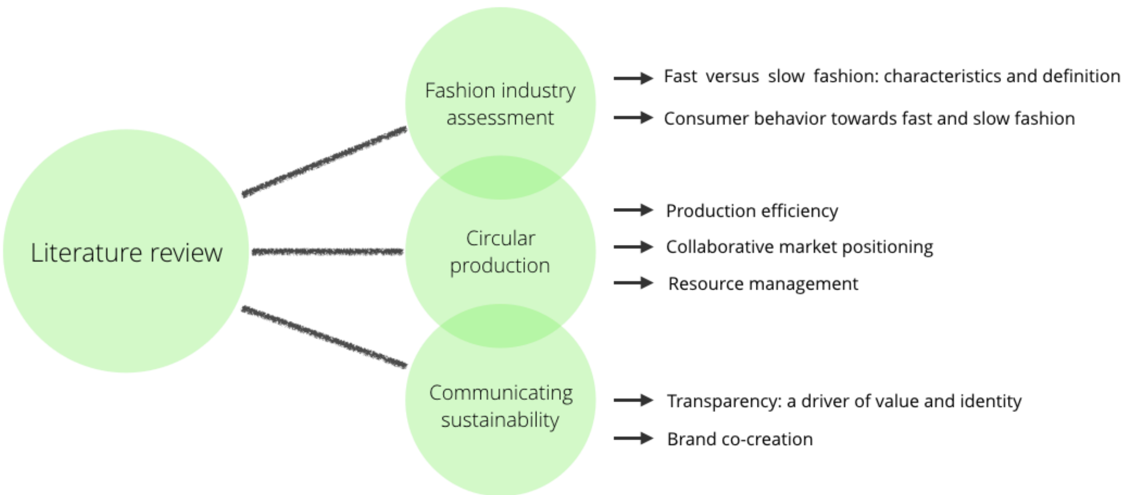

FIGURE 1: Literature review structure - self-elaborated

a. Sustainable development

The most well-known definition of SD was introduced in 1987 in the Brundtland Commission's report, which underlined the importance of 'meeting the needs of the present without compromising the ability for future generations to meet their own needs' (UN, 2011, p.15). According to the report, SD implies not only committing to a durable economic investment in circularity, but also to societal development and inclusion. In fact, the discrepancy in wealth between developing and developed countries suggests a holistic change. Committing to sustainable global development implies an economic, environmental and social protection that must open a new area of economic growth for nations living under extreme poverty. Additionally, population growth rhythm and size must occur 'in harmony with the changing productive potential of the ecosystem' (Brundtland, p.15). SD must be fostered and challenged by the most affluent, leading and growing economies so that these governments engage in durable and realistic investments in ecological development. The triple bottom line links profit with people and planet, reaffirming that economic growth and the environment are not contrary but are essential complementing actors to human welfare (Porter and Kramer, 2011).

Consequently, whilst the United Nations first introduced the Millennium Development Goals (MDG) in 2000, during the UN Conference on Environment and Development focusing on fighting extreme poverty, they were extended and complemented by the Sustainable Development Goals (SDG) in 2015, adding matters such as clean energy, responsible production patterns and good governance issues (www.sustainabledevelopment.un.org). These established goals address the complex, interdependent systems of economy, society and environment in a way that technological progress does not further compromise the human race, but instead offers a healthier standard of living in developed as well as in developing countries.

b. Circular economy

On the other hand, the concept of CE is another essential component to address within the topic of sustainability. Fletcher describes CE, in Sustainable Fashion and Textiles: Design Journeys, as an essential process of using 'yesterday's thinking to cope with the conditions of tomorrow' (p.121). Until the early 1990s, another consumption and economic model than the linear system conducted since the Industrial Revolution was rarely considered (Hellstrand, 2015). The concept of CE may be defined as an alternative flow model to the traditional linear extract-produce-dump material and energy flow (Ellen MacArthur Foundation et al., 2015). Whereas the linear flow extracts resources and energy which are later produced and consumed within a human economic subsystem that inevitably generates waste and harmful emission concentrations, the circular flow limits the input of materials and energy by using renewable, long-lasting nutrients in its system such that production processes are initiated to assure a longer life cycle of products (Korhonen et al., 1999). These production processes are mentioned and illustrated in the following chapters. As the concept of SD underlines, an economy functioning as a cyclical ecosystem generates an economic, environmental and social gain.

2.1. Industry assessment: consumption behaviour between fast and slow fashion

2.1.1. Definition and characteristics

On one hand, fast fashion chains—defined as low-cost clothing collections based on current luxury fashion trends—in Europe have grown faster than the fashion industry as a whole over the past decade (Cachon and Swinney, 2011). 'Fast' in the concept of fast fashion does not only refer to the speed of production but also, and most importantly in the scope of sustainability concerns, to the continuous and rapid desire of consumers for novelty. Well-known high street brands' capability to quickly adapt to the latest trends set by luxury brands, has granted them an ongoing and durable success. Their ability to offer the newest trends for an affordable price, favouring volume over quality, has generated alarming statistics (Wells and Danskin, 2013). These point out a nearly €500 billion value loss due to clothing underutilisation and recycling (consult Annex I). This phenomenon is driven by fast fashion's quick turnaround of styles and yearly collections (Tokatli et al., 2008). Additionally, fast fashion garments are mass produced and outsourced up to at least 13% to manufacturing units in developing and emerging countries, to keep expenses low (Joy et al., 2012). Costs are, subsequently, felt outside the fashion industry in the form of excessive greenhouse gas emissions, resource depletion and climate change. This dynamic of prioritising mass availability and cheapness poses barriers to smaller producers unable to compete with the economies of scale and price minimisation (Fletcher, 2010).

On the other hand, slow fashion may be defined as 'greener fashion solutions, based on the repositioning of strategies of design, production, consumption, use and reuse, which are emerging alongside the global fashion system, and are posing a potential challenge to it' (Clark, 2008, p.428). Favouring artisanship and long-term utility, slow fashion focuses on creating a desire for a limited consumption of high quality, durability and uniqueness. Whereas fast fashion adjusts its collections to competing high street brands every two to three weeks on average, the slow fashion industry introduces a new collection twice a year and favours timeless, season-less collections (Joy et al., 2012).

Even though slow fashion is often based on the concept of offering quality and durability over quantity, it is equally important to point out confusion between 'slow fashion' and 'eco-fashion'. The 'eco-fashion' framework, often referred to as the 'farmers' market approach' and strongly linked to the 'locally made' aspect (Johansson, 2010) in fashion production, introduces the triple bottom line into its manufacturing processes. Its environmentally friendly inputs processed through sustainable techniques give manufacturers a holistic view over the whole supply chain, allowing them to focus on optimising their cradle-to-cradle approach. The latter motivates suppliers to keep expenses low whilst optimising and extending the garment's life cycle and incentivising stakeholders and consumers towards a greener lifestyle (Lozano, 2007). However, most slow fashion businesses are equally associated with ecology but from a sustainable consumption point of view:

> […] consumers are more aware of the impacts of products on workers, communities and ecosystems. It is about a richer interaction between designer and maker; maker and garment; garment and user. (Fletcher, 2007)

As Kate Fletcher resumes, slow fashion focuses on slowing the pace at which consumers purchase and manufacturing proceeds to generate increasing volume. Considering its main characteristics of timelessness, quality, durability, uniqueness and limited quantity, the slow fashion movement may be considered an eco-friendlier movement in which GSCM may become easier to apply than in fast fashion.

Consequently, for a greener future of this industry, it seems crucial to merge the two current opposite positions: to reconnect fast fashion with environmental reality and make it invest in renewable resources.

2.1.2 Consumer behaviour towards fast and slow fashion

2.1.2.1 Anti-consumerism

The recent media coverage of fast fashion's societal and environmental repercussions, has added an individualistic and utilitarian approach[4] to sustainable consumption (Moisander, 2007). This progressive and incremental change over the past decade, prompted by disasters such as the Rana Plaza incident[5], has led to the rise of terms such as consumer resistance, boycotting, non-consumption and anti-consumption (Shaw and Riach, 2011). Increasingly aware that individual, insatiable consumption desires foster cycles of mass production, consumers are demanding a durable relationship between social responsibility, ethics and product offerings (Kotler et al., 1996). According to Binkley (2008, p.601), anti-consumerism is defined as follows:

> […] a broad set of ethical and political positions and choices, it also operates on the every-day level of mundane consumer choice, through critical discourses about the market itself, where small decisions serve to anchor subjectivities in constructed and heavily mediated narratives of lifestyle, self-hood, community, and identity.

Anti-consumerism and the mentioned fashion streams divide consumers into different types of ethical behaviours (Carrigan and Attalla, 2001). Falling under the category of 'caring and ethical' and defined as consumers acting according to their ethical considerations, anti-consumerists turn fast fashion's selling propositions into 'a critical discourse about the market itself'. The opportunity of having multiple evolving selves, used as the selling point of fast fashion offerings, becomes the pivotal point for a shift towards greener and conscious consumption (Beard, 2008). The once attractive and self-esteem boosting selling proposition of the fast fashion stream has started to trigger consumers to begin an opposite identity and community-building process (Elsie, 2003).

[4] The utilitarian approach underlines ethics that relate to the consequences of an action. Utilitarianism focuses on the outcome of an action by determining and pondering its final positive or negative impact (Nantel and Weeks, 1996).

[5] On the 24th of Abril 2013, the Rana Plaza building located in Dhaka, Bangladesh and housing five garment factories collapsed, killing 1,132 people and injuring over 2,500. The incident led to the world's attention to unsafe and unfair labor conditions provided in the garment sector. Since then, 35 further incidents occurred injuring 491 workers and killing 27 others. The Rana Plaza garment factory produces textile for brands such as Primark, Mango, Benetton as well as El Corte Inglés (https://www.ilo.org/global/lang--en/index.htm)

Consequently, this alternative consumer engagement in the fashion industry stream provides an opportunity for companies to satisfy the needs of the consumer, the society and the environment.

2.1.3 Fashion movement distinction and opportunity

As stated in the previous subchapter, the confusion between eco-fashion and slow fashion has labelled slow fashion as being a sustainable fashion movement (Kapferer and Bastien, 2012). From this same perspective, it is important to note that the literature also identifies a confusion in consumers' minds between slow fashion and the luxury industry. The long-standing concern for quality, durability and a limited annual collection leads consumer to assume that luxury and slow fashion consider sustainability concerns in their product offerings. Consequently, some literature about consumer behaviour and perception describes luxury brands as 'ethical mainstreaming' (Thompson and Coskuner-Balli, 2007). This concept refers to a process in which consumers are willing to pay a middle-range to premium price for products they believe to be supporting green production behaviour. For this reason, critics underline the controversial tendency in presenting ecological fashion as it is confused with middle-range to premium priced slow fashion, which is a luxury item primarily accessible to bourgeois consumers.

On the contrary, the opposite literature stream perceives this confusion as an opportunity for the luxury fashion industry to become a leader in sustainability. Connotations of artisanship, authenticity, and social and environmental respect, should be added to the conventional experiences of quality, durability and style promoted by luxury fashion (Van Nes and Cramer, 2005). Even though fast fashion may emulate luxury products, the values of authenticity, innovative design and effective low-impact manufacturing of luxury items may be perceived as more trustworthy due to its production pace and volume (Blendell and Kleanthous, 2007). As consumers are demanding more authenticity and transparency from brands, green sourcing and manufacturing can become a point of differentiation led by the luxury market. The rise of the equalisation of sustainability and luxury should enable a shift from fashion as an 'image' to the materiality of fashion (Clark, 2009). The materiality of fashion may add artisanal quality to the value set of luxury and sustainability (Barnes and Greenwood, 2006). Creating innovative business and production models in the luxury fashion, as demonstrated by one of the parties of the comparative case study, transforms garment production into artisanship.

2.2 Circular production: adopting green supply chain management

This chapter considers the logistical and production requirements for a durable commitment to circularity. As mentioned, business activities have posed a significant threat to environmental welfare. Concerns such as the rise of carbon dioxide emissions due to the use of hazardous chemicals and fossil fuel, have been increasing the necessity to consider a circular supply chain. Not only does circular production generate benefits including reduced operating expenses, new revenue streams, a closer customer relationship and a balanced revenue stream, but circular advantages also include identifying barriers, inefficiencies and opportunities hidden in product development. Accordingly, the following subchapters identify opportunities and requirements in the adoption of a GSCM which facilitates the recognition of durable resource management programs, production efficiency strategies and important stakeholders' collaboration opportunities.

2.2.1 Green supply chain management

Indeed, 'supply chain management' (SCM) is crucial to the shift to a greener production procedure. This term can be defined as a combination of stages that 'from end-user through original suppliers, provides products, services, and information that add value for customers and other stakeholders' (Lambert et al., 2006, p.2). The primary goal of an SCM is to improve and enhance the long-term performance of each step along the chain. Whilst short-term objectives of an SCM target reduced cycle time and inventory, the long-term goals aim for enhanced profits through market share and customer retention (Mathews and Tan, 2011).The literature recognises that a successful and effective SCM may improve life cycle time records by between 30% to 60%, customer responsiveness, inventory reduction and forecast accuracy (Mohanty and Deshmukh, 2005). A key benefit of SCM, important for a durable implementation of sustainability in supply chains, is the transparency and control over each of the five stages.

A GSCM controls the traditional five stages of a regular supply chain—resource supplier, manufacturer, distributor, retailer and consumer (Li et al., 2009)—and adds environmentally caring choices. These stages are connected by a flow of information, time, money and products which generates a sub-system of activities and relationships necessary to the transition to a greener and more sustainable value chain (Chandra and Kumar, 2000). The implementation of these activities focuses on minimising waste during the production chain to optimise product design and the delivery of the final product. A first activity to consider in a GSCM is the production efficiency and, more specifically, the end-of-life assessment techniques.

2.2.1.1 Production effectiveness: Transition from eco-efficiency to eco-effectiveness

Moving to an eco-efficient business strategy, through a waste resources-based procedure, means ensuring growth potential and the reduction of risk of unstable markets because of the price volatility of scarce materials (Lacy and Ruqvist, 2015). As the circle increasingly closes, managers become aware of the embedded value of raw materials and waste present in a traditional, linear supply chain. The decision-making during and after the product development process affects up to 80% of the product's environmental and social impact (Torres and Gardetti, 2013).

Accordingly, a key theoretical aspect to consider when defining the circular production framework is the second law of thermodynamics, which perceives the earth as a closed system that requires human beings to make use of a restricted number of resources in order to survive (Pearce and Turner, 1990). The planet should be perceived as a spaceship in which a limited supply of resources is available for the whole lifetime of the astronaut.

Braungart and McDonough supplement and illustrate the concept with the 'cradle-to-cradle' approach. This approach perceives men as a biological species inside the ecosystem rather than an economic species and can be defined as 'a framework for designing products and industrial processes that turn materials into nutrients by enabling their perpetual flow' (Braungart et al., 2007). The cradle-to-cradle concept requires the economy and man to revise the term 'product' by approaching it as a two-faced metabolism allowing the safe circulation of biological and technical nutrients. On one hand, biological nutrients follow the natural process of biodegradation without a hazardous impact on the environment and may be considered as 'a product of consumption', consumable during its total lifespan and beneficial to the environment during its degradation process (Braungart et al., 2007). On the other hand, technical nutrients are classified as 'products of service', which can be reused through a process of remanufacturing, redesigning, recovering and, as a last reprocessing approach, recycling. The reprocessing of technical nutrients carries a beneficial outcome for the manufacturer as well as for the consumer, because the manufacturer maintains ownership over valuable resources and assures a liable, eco-friendly quality for the consumer (Braungart et al., 2008).

Although recycling has been the most used reprocessing method of resources and considering the second law of thermodynamics, the literature has distinguished between eco-efficiency and eco-effectiveness since the early 1990s (Carley and Spapens, 1998). Eco-efficiency can be defined as 'a reactionary approach that does not address the need for the fundamental redesign of industrial material flows' (Braungart, 2007, p.34). The concept maintains the linear dynamic of the linear material flow as raw materials are extracted, transformed and disposed (EMAF, 2015). Eco-effectiveness, contrarily, is identified as 'the transformation of products and their associated material flows such that they form a supportive relationship with ecological systems and future economic growth' (Braungart, 2007, p.34). This term focuses on generating a cyclical flow of materials in a way that the life cycle of products is extended.

The transition of a linear supply chain towards an eco-effective GSCM demands the adoption of one or several production techniques at the beginning or end of the supply chain:

1) The necessary transition from efficiency into effectiveness is closely linked to the 'Life Cycle Assessment' (LCA), a concept generated from the cradle-to-cradle approach. Indeed, the LCA aims to review every single step of the processing stages to identify and enact actions to minimise environmentally harmful processes (Akerberg, 2015). The product's life cycle begins with the choice of raw material, followed by the raw material processing, manufacturing, packaging, distribution, use, re-use and product disposal.

   As a result, brands have increasingly opted to establish so-called 'indices' to guide their product development teams to always opt for eco-effective materials (Niinimäki, 2010). Brands such as Nike and Timberland belong to the broader reaching association, the Sustainable Apparel Coalition's Higg Index (SAC), currently sponsored by over 90 brands and suppliers. First introduced by Walmart and Patagonia in 2009, the SAC provides the necessary tools for a holistic overview allowing transparency and sharing knowledge to become the key drivers of a retailer-manufacturer relationship (Sustainable Apparel Coalition, 2018). The association offers actors of the textile industry the possibility of a continuous assessment and monitoring of the various steps in the supply chain whilst providing them with a set of tools applicable throughout each activity of the chain.

2) Increasingly attractive since the early 1990s, GSCM has encouraged managers to include an essential, additional step in their supply chains: reverse logistics (Rogers and Tibben, 2001). Reverse logistics induced the final and crucial step of returning used goods to the supply chain, so that they may be reused as inputs for new products or remanufactured and optimised to be reconsumed (Carter, 1998). This additional step allows retailers to establish return and scan-back policies with their distributors to avoid losing embedded value to landfills and to simultaneously lower costs at the beginning of the manufacturing process (Shen et al., 2013). The goal is to retain used goods at their highest values so that the reprocessing stage continues being more attractive than resourcing virgin alternatives (Lacy and Rutqvist, 2015). Such deals allow eco-effective coordination of the different production stages and, consequently, better performing

supply chains, effectively minimising waste and allowing consumers to continue their current rampant consumption behaviour in a more responsible way.

According to the Closed Loop Fund[6], $11 billion worth of packaging materials is sent to landfills yearly due to poor return chain infrastructure. Even though recycling has been a widespread practice amongst the various industries, 60% of global waste is still not being reprocessed into re-consumable goods, sending $17 million tons of material per day into landfills and generating $1 trillion of global waste loss (Green Alliance, 2014). Consequently, companies have faced such operational inefficiencies with the radicalisation of the reverse logistic movement towards a 'zero-waste' supply chain strategy.

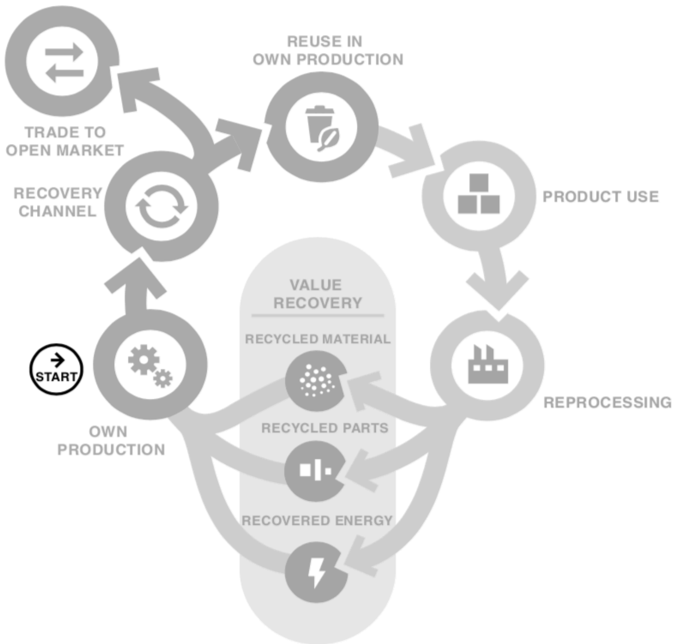

FIGURE 2: Zero-waste procedures – Waste to wealth, 2015

As illustrated in figure 2, zero-waste operations recover lost embedded value in traditional, linear supply chains so that waste becomes the beginning of the production procedure instead of disposal. Whereas the recycling and recovery model relies on recovering end-of-life products to recapture embedded value from closed loop or linear company products,

[6] The Closed Loop Fund was founded by Johnson & Johnson, Procter & Gamble, Unilever and Walmart in 2014 with the objective of investing, together with municipalities, in recycling and return-chain infrastructure (http://www.closedlooppartners.com/closedloopfund/)

this zero-waste model focuses on waste and by-products of its own production. The price volatility of fibers such as cotton is due to plantations being endangered by the current, environmental disasters happening across the globe. This volatility reconceptualises the upfront investments of firms, not only at the end of the life cycle as reverse logistics may suggest, but also at the beginning of supply chains (Lacy and Rutqvist, 2015). Resourcing from return chains requires a regenerative product-material loop such that when companies decide to move to circularity, the change must happen in three steps: resource constraints, customer value proposition and technological innovation (Lacy and Rutqvist, 2015).

2.2.1.2 Collaborative market positioning

The resource supplier as well as the manufacturer play an essential role in the product offering for the final consumer and in the business strategy of the buying partner. Combining organisational and environmental practices generates economic advantages in addition to providing a long-term social and professional legitimacy (Hoffman, 2000). Such success may, subsequently, engender mimicking environmental caring practices from competing companies in the industry resulting in high economic performance being achieved with optimal levels of sustainability (Carter, 2008). Collaborations between suppliers and retailers are promoted by the literature as the ultimate initiative and response to an efficient and long-term environmental protection, proceeding hand-in-hand with economic development (Li et al, 2013). Not only do collaborations reduce transactional costs, enhance flexibility and promotes performance, but they also build unique capabilities (Dyer and Singh, 1998). Collaborative relationships should be addressed with an adaptive behaviour. Both parties involved identify which resources enable the establishment of unique selling propositions and, consequently, engender immaterial benefits, including brand loyalty, legitimacy and recognition (Nyaga et al., 2010).

As Dyer and Singh suggest, long-term 'collaborative supply chain relationships' enable an interorganisational framework facilitating the implementation of GSCM. However, recent literature also underlines the importance of not building supplier-retailer relationships based on power asymmetry (Maglaras et al., 2015). In fact, a relational approach instead of coercion between the parties is a key driver for a lasting, cooperative implementation of sustainability in supply chains (Shi, Qian and Dong, 2017). In cases of asymmetric power, one of the parties handles the environmental and societal-related problems unilaterally, while the other party is forced to adopt codes of conduct and establish greener practices which may not be efficient enough to combat sustainability problems (Pedersen et al. 2015). As the fashion industry continues to rely on outsourcing and delocalising production chains and management systems in developing countries, the risk for such power asymmetry rises significantly (Abernathy, Dunlop, Hammond and Weil, 1999).

2.2.1.3 Conclusive considerations on GSCM

	Advantages of GSCM
Entrepreneurial and economic gain	- New revenue streams - Reduction of production costs - Cost and wastage transparency fostering credibility and a strong market position - Reduced cycling time and inventory - Forecast accuracy - Technological innovation - Joint research and development (R&D) - Increased competitive advantage - Social legitimacy
Environmental gain	- Effective waste reduction and prevention - Reuse initiatives: recover and recycling models - Increased resource efficiency

TABLE 1: GSCM summary: Economic, entrepreneurial and environmental gain – self-elaborated

From an economic perspective, when environmental and quality matters are simultaneously optimised, the product price and price difference compared to regular, non-organic substances are justified by the material costs and quality, demand and resource quantity (Paulitsch, 2004). Closing the loop provides an increased potential for the growth of companies and efficiently creates new revenue streams, whilst substantially reducing production costs. Likewise, the process of a successful supply chain optimisation is tightly linked with the cost and wastage transparency (Tan et al. 2012). Similarly, companies and small start-ups implementing a GSCM may benefit from cost savings derived from greener practices, such as reducing energy and water usage and maintaining raw materials in a cycle of re-usage and remanufacturing (Wisner, 2012). Besides practical and infrastructural advantages, stock prices may also benefit from a greener commitment. As previous studies confirm, attracting investors may be more effective with eco-friendly behaviour (Flammer, 2013). However, green firms may also need to invest capital in the supplier selection process and implement activities such as training, monitoring and accurate and detailed labelling. Such investments may, consequently, cause a loss of competitive advantage as these processes increase the cost and price of the final product (Maignan, Hillebrand and Mcalister, 2002). As garment prices continuously drop, retailers face a saturated market in which profitability is made by selling increased numbers of units. For this reason, companies must create a win-win situation for both consumers and manufacturers by introducing a new and different logic from the economic growth logic (Fletcher and Grose, 2012).

All in all, the reviewed literature gives an environmental and economic perspective on a textile supply chain and focuses on the upstream division. Economic growth happens whilst environmental damage is reduced, waste is used as a new, valuable resource in a circular value chain and collaborations are established to actively benefit from sustainable practices whilst contributing to a greener industry (MacArthur, 2014). The internal cross-functional assistance that is created highlights the necessity for brands to join R&D efforts in order to effectively transition to a circular industry. The internal cross-functional support that is initiated, creates valuable synergies between influential actors in the textile market resulting in eco-fashion appealing to more than a limited, niche market (Chamorro and Banegil, 2006).

2.2.1.4 Resource management: The current cotton market's differentiation offering

A second activity to consider in the integration of a GSCM into the current business model, is resource management and processing. During the preindustrial times, textiles were manufactured by human beings accordingly to their needs and without a specific scientific approach. By the end of the 18th century, the need for development in the production process of textiles increased such that by the middle of the 19th century, artificial dyestuff and the mercerisation process[7] were introduced (Choudhury, 2011). Until today, cotton farming is one of the most polluting agricultural activities, increasingly applying pesticides and synthetic fertilisers to meet the rampant demand (Babu et al., 2013). Despite efforts to prevent crop failure and serve the demand volume, the current trends in cotton farming have been held responsible for eradicating insects, endangering fish and bird species, polluting soil and air, and increasing production costs (Riello, 2013).

The farming of fibers highly depends on the availability of the following inputs: water, energy, land, labour force, financial capacity and materials (Grose, 2009). With the degradation of climate and soil conditions and the availability of natural resources, alternative growing methods, such as organic, biological or genetically modified, had to be introduced (Forster et al., 2013). Organic production addresses the essential environmental and social issues caused by regular cotton farming by introducing natural pest control, biodiversity and natural plant nutrition. Consequently, the organic cotton benefits and positive impact on the environment need to be internalised by consumers for sustainable farming to become a mainstream market (Illege and Preuss, 2012). The following illustration elucidates the various societal, environmental and economic benefits of the organic cotton plantation (Figure 3.1).

[7] The mercerization process consists in diping cellulosic fibers into caustic soda to enhance resistance to washing and the absorption and resistance of dye (Oxford Dictionary)

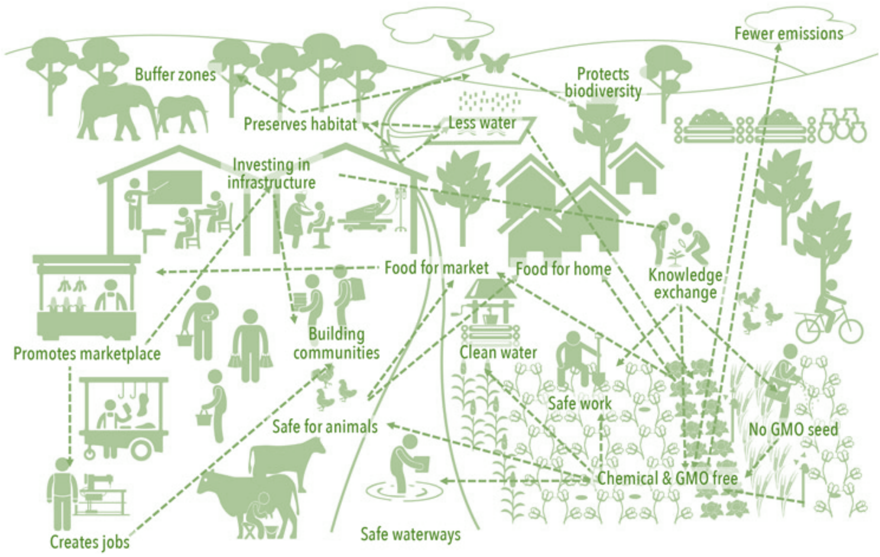

FIGURE 3.1: How organic farming systems work – Textile Exchange 2018

1) From a societal point of view, organic cotton farming aids in the creation of new and additional job opportunities which build communities and foster investment in infrastructures, such as schools. The absence of chemicals and genetically modified cotton seeds (GMCS) from organic cotton plantations, also provides farmers and workers with safer labour conditions. Similarly, as cotton seeds may be found and used in specific food transformation processes such as vegetable oils, organic plantations substantially reduce the risk of carcinosis (Textile Exchange, 2018).
2) From an economic point of view, the environmental benefits—for example, pest control and efficient water retention in soils—generate a series of economic advantages as sustainable cotton farming prepares soils for various types of agriculture. For this reason, the expansion of cotton plantations into food farming allows the generation of food for homes as well as for the market, promoting and fostering the local marketplace.
3) From an environmental point of view, the absence of chemicals and GMCS usage lessens carbon emissions which preserves the natural habitat and does not endanger biodiversity. Organic cotton farming also contributes to a 70% reduction in the acidification of land and water, 91% less water consumption and 62% less energy use.

2.2.1.4.1 Challenges in organic farming

Despite the beneficial contributions of organic cotton, its production still accounts for less than 1% of worldwide cotton production (C&A, 2017). Although technologies are being developed to counteract the use of fertilisers and pesticides, its succeeding costs and reduced availability induces large retailers to blend conventional and biological cotton in order to keep up with the demand. To this date, the bridge between conventional and organic cotton has been completed by GMCS. As a result, GMCS accounts for over 70% of the global cotton production whereas conventional cotton reaches 28% of the global production. Since 1970, cotton consumption has increased by 2.2% yearly, which is exploited mainly by China, the USA and India and has fostered so-called 'cash-crops': cotton plantations for exportation (Paulitsch et al., 2004). The financial attractiveness of these cash-crops encourages farmers to neglect local economic development and leads cotton producers to involve themselves in debt. These debts are generated from chemical supplement purchasing, which are necessary for farmers to keep up with the rising demand of retailers. The exportation of cotton from developing countries, mostly from south African and central Asian territories, has enabled developed countries to continuously drop final prices. Thus, cash-drops have incentivised the use of genetic modification and pesticides in a way that extreme poverty, the destruction of local markets, diseases and hunger form a vicious circle bred by current consumption patterns (Fröhlich, 2004).

Although there are currently various alternatives to conventional fibers, it is important to acknowledge the role of eco-labelling and consumers' lack of understanding of the discussed issues (Hiller Connell, 2010). In fact, as the current literature states, most consumers of given studied samples chose organic options due to ethical concerns, unaware of the impact of regular cotton the environment and human health (Hustvedt and Bernard, 2008). The main reasons identified for this reasoning are the lack of information about the difference between organic and non-organic options as well as about the actual meaning of the term 'organic'. 'An organic cotton garment is indistinguishable to the sight and touch from a garment made of conventionally grown cotton' (Casadesus-Masanell et al., 2009, p.207). As most consumers base their choices on the appearance, price, functionality and fashionability of garments, the obvious and determinant benefits of organic options may not be apparent enough for consumers to make a deliberate and conscious choice (Buckley, 2013). For this reason, eco-labelling plays is a key tool in communicating and informing consumers about linear production processes and its consequences on SD. However, the literature suggests that the multiplicity of eco-labels may create confusion and mistrust (Brécard, 2014). It is essential for retailers to keep the information on eco-labels short, simple and impactful to provoke a positive attitude towards green labelling. Green labels should provide simple and concise information about the raw material and its subsequent benefits so that curiosity is triggered, and a competitive advantage is created (Grankvist and Biel, 2007).

2.2.1.4.2 Cotton alternatives

To this date, alternatives to conventional cotton or GMCS have been exploited by smaller start-ups. Options such as biosynthetic fibers and natural plant fibers made of renewable resources have been effectively reducing excessive cotton consumption and soil degradation and eliminating waste from overcharged landfills (Textile Exchange, 2018).

This procedure is perceived to be the most eco-effective method to mitigate CO_2 emissions and their resulting global warming. A transition of the textile industry from scarce resource utilisation, such as oil, to a bio-economy is crucial considering that the Centre for International Climate Research forecasts that 65% to 80% of the current 115 years of coal and 50 years of oil and natural gas remaining should be untouched to prevent global temperature from exceeding the targeted 2° Celsius agreed upon during the Paris Climate Change Conference. Although petroleum-based polymers, such as nylon, polyester and acrylic, are more attractive when oil prices are low, considering bio-based polymers offers manufacturers a portfolio diversification, a greener supply chain and economies of scale (Sudbury and Kohlbacher, 2016). From a socio-economic perspective, a bio-economy is valued at over €2.2 trillion, generating 18 million jobs in the EU (Textile Exchange, 2018).

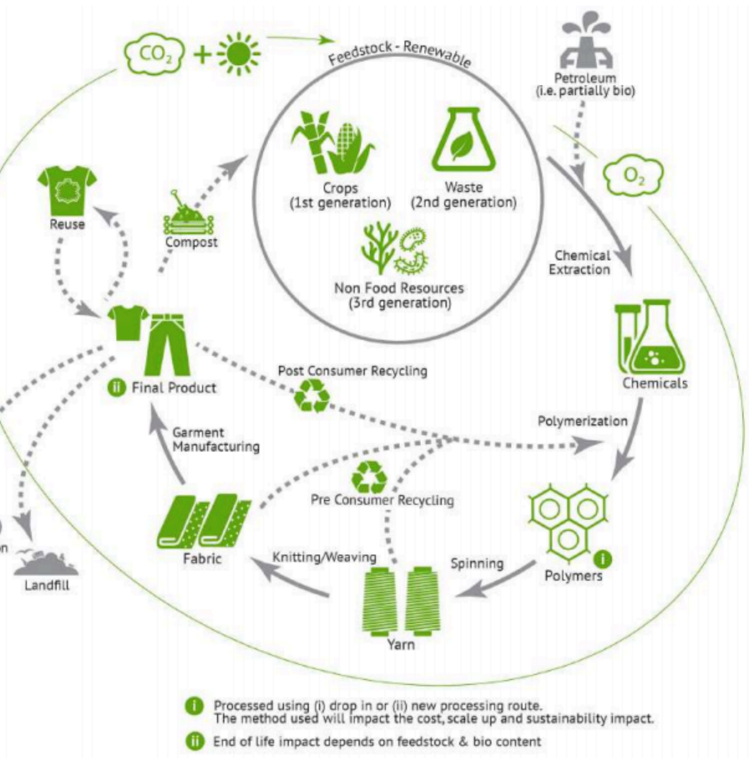

FIGURE 3.2.: Biosynthetic life cycle – Textile Exchange, 2018

As illustrated in Figure 3.2, biotechnology introduces biological sources such as biopolymers into the fiber processing chain, allowing the effective implementation of recovery and recycling models such as reverse logistics or zero-waste models. In fact, biosynthetic fibers consist of bio-based polymers[8] provided by crops (1st generation), waste and biomass (2nd generation) or non-agricultural, molecular resources (3rd generation). The chemical extraction of such biopolymers out of natural feedstock facilitates the creation of yarn through a spinning process. From the yarn on, the knitting and weaving process produces fabric which will allow the garment manufacturing to begin. The final clothing item produced then ends but also restarts the production process as the dotted lines suggest. The human component in this cycle is equally important in the successful circularity of the inputs. As the dotted files indicate, consumer behaviour regarding the final product is a key stage in the re-usage and recycling of the final product into an input (Textile Exchange, 2018). Depending on the life cycle stage, the final product may be disposed of in a landfill, reused by several consumers or composted as a renewable feedstock. Post-consumption recycling

[8] Biopolymers, such as protein, cellulose or DNA, are the molecular substances occurring in living organisms (Oxford Dictionaries).

and the pre-consumption recycling of used yarn and fabrics are key recycling steps that add potential value and time reduction to the production cycle.

In conclusion, proceeding with renewable resources has the advantage of a short and cheaper reproduction cycle whereas fossil feedstocks have a considerably longer one. Relying on waste and crops lowers financial and material risks as evident in cotton production endangered by droughts, floods or plant diseases. Bio-based procedures also considerably limit water and energy usage whilst reusing and transforming inputs, drivers of carbon emissions, which eventually would be released into the atmosphere.

2.3 Communicating sustainability

As previously stated, GSCM is an essential tool to durably implement sustainability into the upstream activities of the supply chain. The literature discussed emphasises how the logistical advantages of GSCM may benefit the downstream activities. Thus, this final subchapter of the literature review, provides insights into how the logistical and technical components of a GSCM may be utilised and profited from for industrial branding.

2.3.1 Transparency: a driver of value and identity

Business-to-business firms have been understanding natural resources as a mean of creating competitive opportunities, not merely to deal with societal and governmental pressure, but also to expand and reinforce brand-building strategies. Creating value and, thus, transparency through green supply chains joins consumers, suppliers and retailers in a 'win-win-win' situation (Paulraj, 2011). Social and environmental aspects create important attributes to which contemporary consumers, specifically Millennials[9] and Generation Z[10], can relate and which build a visual identity in consumers' minds (Meffert und Rauch,

[9] Millennials represent the generation born between 1979 and 1994, representing about 24% of the adult EU population (Kotler and Keller, 2012). Categorized as a generation of substantial purchase power, Millennials show an instinct of social responsibility towards companies and society (Furlow, 2011).

[10] Generation Z was born in the 1990's and raised in the 2000, accompanying crucial technological changes as the evolution of the web, smart phones and digital media (Bascha, 2011). Literature identifies Gen Z as the generation mostly concern with environmental issues, consequently manifesting an early engagement in socio-political concerns (Slavin, 2015).

2014). With the rise of digital media and online customer communities, transparency has become a key strategic tool for customer retention. Contrary to a linear economy which focuses on a traditional core activity, a CE fosters multidimensional innovation processes such that an ecosystem of partners is formed, making CE a collaboration between forward-thinking suppliers and retailers (Pauli, 2010).

The modern branding paradigm represents product attributes as expressions of social and moral ideals (Holt, 2002). Successful branding strategies build a brand image corresponding to existing social concerns and ideals in order to foster customer satisfaction (Duncan and Moriarty, 1998). Consequently, brand managers must analyse and identify the most impactful traits existing in upstream activities in order for the 'sustainable branding' trend to become credible and authentic (Mefferte et al., 2010). The technical and material value captured in the circular supply chain must be transmitted through downstream activities as a selling proposition. As suggested when the alternatives to conventional cotton were presented, the recovery and recycling model turns by-products and waste into opportunities to create shared success. Value creation does not only generate long-term customer satisfaction but also motivation for partners to continuously seek future-oriented value creation opportunities demanding radical system-wide changes, which will eventually provide downstream activities with the needed inputs for strong market positioning.

With dense competition in the fashion market, companies applying such business models as described previously, must be able to position themselves as authentic and transparent competing entities, offering greener options to conventional clothing and also the necessary education about sustainability issues (Kim and Hall, 2015). A well-structured and fact-based green communication would permit consumers to assess the credibility and accuracy of companies (Yan et al., 2012). Leading managers and their partners must agree on a set of common values leading to an alignment of thoughts, actions and communication to build a strong brand culture and identity (Osburg and Lohrmann, 2017).

2.3.2 Brand co-creation

Engaging in such production models gives rise to the necessity to understand the marketing strategy involving both partners. Both the buyer and the supplier engage their brand in a corporate brand image to establish a set of external perceptions, which is later communicated to the final consumer (Brown et al., 2006). In fact, brands often represent a set of short-cut values, attributes, beliefs and future expectations which form a system of interconnected mental associations and relationships (Kapferer, 2008). For this reason, a brand may be defined as 'a distinctive identity that differentiates a relevant, enduring, and credible promise of value associations with a product, service, or organisation that indicates the source of that promise' (Ward et al., 1999). In a globalised industrial product, branding does not only incorporate product-related attributes but more so the attached policies, logistics and corporate image (McQuiston, 2004). Brand literature identifies the concept of the 'brand' to have become a social process to which various stakeholders contribute and influence the desired identity (Merz et al., 2009). Mudambi (2002) identifies three distinctive attributes essential to industrial buyers: the branding, the product and the augmented service. Since there is a lack of research regarding the augmented service in the current literature, this study underlines the importance of understanding 'augmented service' as the result of B2B relationships in the methodology and discussion chapters. Consequently, it is important to identify how internal branding and brand co-creation are evaluated as a service offering, crucial to the durable implementation of sustainability between companies.

Indeed, the concept of 'brand co-creation' emphasises the opportunity for co-operating brands to engage in a symbolic, interactionist approach. The latter may be defined as the subjective willingness to act and communicate in a given way (Parker and Ward, 2000). Enthusiastic consumers may act as brand advocates contributing to a product's marketing. Similarly, the actors in a collaborative relationship may appear as proactive components who offer their partners the possibility to access various marketing strategies because of their unique value proposition. As such, within industrial buying, manufacturers purchase a brand when engaging in a collaboration with a retailer. Retailers engage the manufacturer in the organisation's production process and already implement end-customer marketing strategies, especially when the production process permits a unique identity building (Beverland and Farrelly, 2010). As previously suggested during the discussion of the importance of material transparency for identity building, value co-creation also happens when both parties establish a brand storytelling (Lundqvist et al., 2013). Discovering an aspirational communication strategy is tidily linked with intangible and emotive characteristics such as responsiveness to consumer concerns, trust and reassurance (Aaker, 1998). As a result, B2B branding as a concept has emerged from the consciousness of how brands are not only a valuable intangible asset for consumer perception but also for market penetration (Gregory, 2007). Over the last decade, research has proved how brand names may help customers recall key product information. Such conceptualisation of a brand name as an associative cue tool, equally, gives rise to the conceptualisation of a brand name as a predictive cue about performance and brand extension strategies. When co-operating with a brand, leading managers need to assess how the co-operating brand's identity transforms the business: what attributes, advantages, benefits and ideals are created (Akabari, 2018).

Consequently, analysing co-creation as an exchange of symbolic and multidimensional roles highlights the necessity of perceiving the partner as a contribution to the brand image (Heikkinen, 2007). Sharing competencies, networks and specialisations fills mutual gaps and brings a product line into the market which may provide more visibility and buzz than conventional products (Akabari, 2018). The green corporate brand strategy unites both partners' visions in content marketing, promoting educational rather than promotional content and sharing production and market expertise (Aaker and Joachimsthaler, 2000).

In total, the literature has widely explored the co-creation of value and brand image in B2C, leaving insufficient insights about industrial branding. Brand management should be understood as a permanent tool of industrial collaborations and addressed as a bilateral activity between companies and stakeholders, such as suppliers, manufacturers and retailers.

Chapter III
Methodology

3.1. Research method: A comparative case study

In order to address the research objectives previously stated, a case study was perceived as being the most appropriate research method to address the research questions set in the introductory lines, considering the information and observations gathered throughout the interviews conducted. Indeed, the research questions seek to explain "how" and "why" a contemporary, social phenomenon requires an extensive and in-depth description. Furthermore, opting for a case study allows this study to build a conceptual base, lacking in existing theory and further explore the related concepts (Yin, 2009). Although literature presents different definitions of the concept of a "case study" over the past decades, we conclude that a case study may be defined as "a method of obtaining a "case" or a number of "cases" through an empirical examination of a real-world phenomenon within its naturally occurring context, without directly manipulating either the phenomenon or the context" (Kaarbo and Beasley, 1999, p.372).

Case studies allow to analyse real-life events as a result of links established over a period of time consequently answering explanatory questions ("how" and why" questions). Accordingly, opting for an exploratory case study, allows the study to understand the intervention of marketing activities in the complex phenomenon of CE and its required commitment of businesses. In particular, the case study aims to understand the context under which non-green oriented companies integrate green committed partners in their supply chain for growth and differentiation purposes. Being a complex phenomenon in a real-life context engaging a multiplicity of green and linear business models, quantitative data would fail to illustrate the context properly (Yin, 1994).

However, as the topic suggests, CE as well as the fashion industry may be considered as a movement involving and asking for multiple economic and social entities. There are various movements and tendencies in the fashion movement as well as in CE. Thus, a multiple case study is required to give a holistic and realistic portrait of the current situation. A comparative case study method offers the possibility to analyse an economic entity within a multiplicity of perspectives, establishing a chain of evidence based on concrete cases and techniques (Ritchie and Lewis, 2003). The inferences between events or entities, analysed through qualitative aspects of the cases, create a narrative and analytical form of a how and why suggested phenomenon evolves in a given way (King et al., 1994).

A primary analysis of the obtained data suggested essential discrepancies but also common strategies in both types of fashion movements indicating that a holistic, realistic and in-depth insight of the respective marketing activities could be portrayed through a comparative case study. Figure 4 divides the study in three steps, beginning with the selection of both cases and the data gathering, followed by the analysis of primary and secondary data, which will lead to the identification of B2B marketing strategies each one of the companies applies. The ending step draws general conclusions by comparing the marketing strategies and suggests a replication logic for future CE implementation in the fashion industry (Yin, 2009).

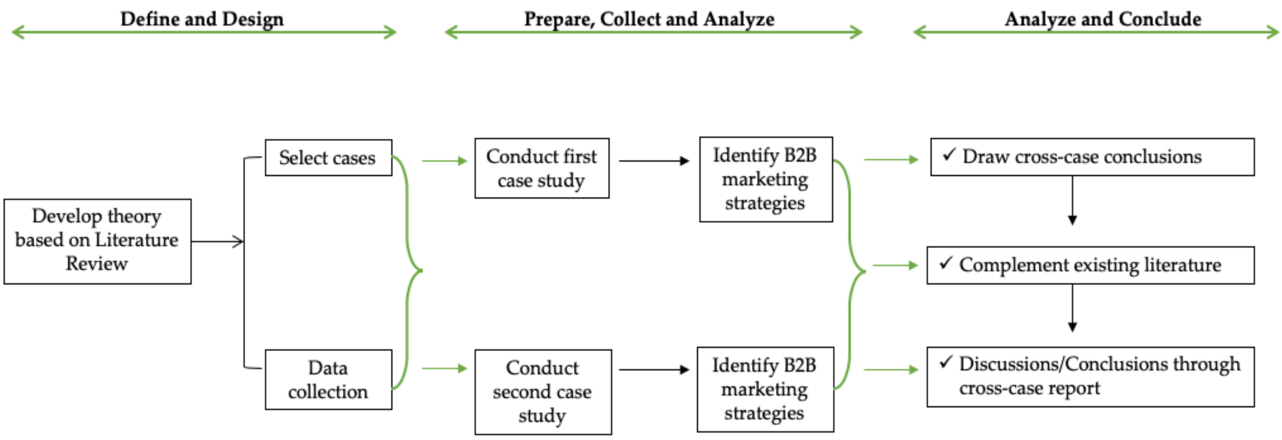

FIGURE 4: Comparative case study method and structure in this study – adapted from Yin (2009).

3.2 Selection criteria and procedure of the compared case studies

The suitability of the proposed companies for this study were judged by the company's commitment in sustainable fashion (Payne and Frow, 2009), its green branding strategy as well as the company's selection of partners. After establishing a list of brands corresponding to these criteria, 216 e-mails were sent to the responsible departments of these brands, from July until the end of September. From these 216 e-mails, only nine were answered and from these nine only Orange Fiber and ASOS were willing to collaborate.

Thus, Orange Fiber and ASOS will be the two firms presented in the following chapter, as a means of suggesting divergences as well as similarities of marketing activities, in both the slow and fast fashion movement. Whilst Orange Fiber has started acting in the luxury fashion industry with its exclusive technique of creating sustainable fabrics from citrus juice by-products, ASOS may be considered as one of the leading online retailers, currently shifting towards organic and sustainable textiles in their selling proposition.

3.3 Qualitative data gathering: in-depth interviews

The necessary data about both companies was gathered through two in-depth interviews. The interviewee's answers were complemented with secondary data such as information available on the brands' websites, official reports and case studies. (Yin, 2009). The interview focused on the interviewee's perspective and own actions on the phenomenon of B2B marketing strategies. Their perspective on co-creation of brand image and the role of marketing incentives in the adoption of circular business models, served as a basis for description of reality and tools for constructing a theoretical discussion. Indeed, both interviewees serving as primary data source, are representative of a supplier as well as of a retailer.

ASOS wished to be interviewed via a Skype call which resulted in a semi-structured interview for about half an hour with Claire Bates, a circular fashion associate responsible for the sustainability department of ASOS. As the first questions concerning ASOS consumers' sustainable buying behaviour could not be answered because researches and reports were to be concluded, the interview evolved into a semi-structured, informal and conversational interview. The interview guide can be consulted in appendix I. Throughout the interview, the researcher pointed out different topics such as supplier management, the role of marketing and the importance of spreading awareness between businesses. The recorded and transcribed interview can be found in appendix I.1. Orange Fiber, on the other hand, wished to be sent a questionnaire in Italian of maximum five questions. The later structured interview guide as well as the company's responses can be consulted in appendix II.

To ensure the gathered information was following a systematic and accurate analysis, the case study focused on identifying external actors' and activities' with direct and indirect influence on B2B practices (Mäläskä, 2011). As such, the theoretical dimensions of the topic approached above guided the subsequent analysis by interrogating why and how their current sustainable and green practices focus on starting a chain effect in the textile industry.

3.4 Perceptual mapping

In addition to the comparative case study, the research is concluded with an attribute-based perceptual map, in order to address the second research question. A perceptual map aims to understand the positioning of products in costumer's minds: "Positioning in the minds of customers typically results when an organization follows deliberate strategies to design products with characteristics distinct from those of its competitors" (Lilien, Rangaswamy and Bruyn, 2007, p.78). In this perspective, the evaluation of consumers' perception assures marketing managers that the wanted benefits and product experiences are perceived as desired.

The perceptual map will allow to conclude the study by adding consumer's perspective on B2B branding strategies. Although these mainly focus on attracting benefits for both partners engaging in a collaborative, circular production, B2B branding strategies, inevitably, aim to persuade the final consumer. Indeed, even though B2B branding strategies may influence the further adoption of circular models in the fashion industry, they may as well attribute to marketing strategies, an educational role. As such, the evaluation by consumers of the selected attributes will allow to understand consumers perception of the studied brands and their attached, wanted attributes.

3.4.1 Attribute selection

According to literature, attribute-based methods "derive perceptual maps from the evaluations of competing products along prespecified dimensions by customers within a selected target segment of interest" (Lilien, Rangaswamy and Bruyn, 2007, p.83). Hence, the selected attributes were selected based on the previous literature review as well as on the most important attributes underlined by marketing strategies of both Orange Fiber and ASOS. This research focuses on understanding both the strategic (e.g. brand image) and tactical (e.g. product design) positioning which justifies the mix of tangible and intangible attribute selection:

1) Durability refers to the product's expected life-cycle.
2) Transparency refers to the brand's perceived availability to share insights.
3) Credibility refers to the effectiveness of the communication of the brand.
4) Expected quality refers to the degree to which the consumer expects the product to meet his or her quality standards.
5) Trustworthiness refers to the consumer's willingness to repurchase a product.
6) Self-esteem refers to the consumer's peace of conscience regarding ethical and environmental issues after purchasing a product.
7) Innovation refers to the brand's innovative business model and commitment.
8) Environmental utility refers to the brand's perceived, effective contribution to environmental prosperity.
9) Clarity refers to the ease of understanding of a brand's sustainability commitment.

3.4.2. Data collection and scaling

The research proceeded with a focus group as this study aims to understand consumer reaction to collaborations by presenting two concrete examples. An online survey would therefore not be adequate as it does not allow further information giving and question answering, in case doubts about one of the cases would arise. The focus group was composed of two groups of five and six participants each. The interview was conducted through a qualitative, semi-structured interview as the multiple case study research asks for some structure, in order to ensure comparability between both cases. Depending on how the conversation developed and which topics seemed to particularly arise different opinions, the script was followed in a different order. The guide was constructed using the research questions, as well as the information gathered throughout the literature review and the interviews conducted with both Orange Fiber and ASOS (consult appendix III).

At the end of the discussion, participants were distributed a questionnaire divided in two sections, used to elaborate the perceptual map. Firstly, participants evaluated the degree of similarity between the four brands, ASOS, ASOS Exclusive, Orange Fiber and Ferragamo Orange Fiber. This first evaluation allowed to assess the perceived differences between the brands in a Likert scale ranging from 1 to 9, where 1 denotes 'not similar' and 9 denotes 'completely similar' (consult appendix III.2). The second part of the questionnaire, consisted in an attributed evaluation for each brand, in order to understand the factors that differentiate the brands from one another. Respondents were asked to rate each, individual attribute in a Likert scale ranging from 1 to 9, where 1 denotes 'not accurate at all' and 9 denotes 'fits completely' (consult appendix III.1).

Chapter IV
Comparative case study

The comparative case study will start by presenting both brands, their mission and vision as well as the environmental concerns encouraging their business models. Then, four marketing strategies respectively will be discussed, by identifying an opportunity in their respective business models and analysing how it was applied as a marketing strategy in B2B relationships. Finally, a comparative case study discussion will answer the above settled research questions, by linking the Literature Review chapter to the findings of the comparative case study.

4.1. ASOS

4.1.1. Contextualisation

Established in early 2000, the British beauty and clothing online retailer ASOS (acronym for 'As Seen on Screen') offers a millennium-focused, inclusive and differentiated fashion range. Based in the UK with its principal headquarters in London, this leading online retailer offers an ever-shifting inventory of 87,000 clothing items on its website, adding around 5,000 styles every week to its various lines. As of today, ASOS ships products—ranging from clothing items and footwear to makeup and skincare—to over 230 countries, resulting in international sales representing over 62% of the company's total revenue (Harvard Business Review, 2018). Besides the merchandise in its own label, which was introduced in 2004, ASOS includes over 850 third-party brands in its product portfolio. Over 60% of the styles sold are exclusively available on the ASOS platform due to exclusivity deals with selected brands. To keep novelty and uniqueness at the core of its business strategy, the British company regularly sponsors fashion competitions granting up to £50,000 prizes to 'fresh and emerging brands' (ASOS report 2017). The following table 2 suggest how ASOS's success has been growing, particularly in terms of sales and active customers.

	2017	2018
Retail sales	£1,876.5m	£2,355.2m
Revenue	£1,923.6m	£2,417.3m
Gross margin	49.8%	51.2%
Profit after tax	£64.1m	£82.4m
Average selling price/unit (VAT included)	£25.16	£24.29
Active customers	15.4m	18.4m
Total orders	49.6m	63.2m
Platform visits	135.7m	157.2m
Social media followers	n/a	22.7m

TABLE 2: ASOS key performance indicators 2017–2018 – self-elaborated with Corporate Responsibility Report 2018 data[11]

4.1.2. Mission and purpose

The company has focused its mission on becoming the 'world's number-one destination for fashion-loving 20-somethings' and aims to differentiate itself by listening to Generation Z's rebellion against fitting into society's stereotypes, particularly concerning body image (Forbes, 2018). Its differentiation strategy involves promoting genderless fashion whilst engaging in fostering body positivity by refusing to photoshop body imperfections such as freckles and cellulite. Positioning itself as an 'inclusive design' brand, its own label extends its range by offering styles for 'Curve, Tall, Petite and Maternity'.

In addition, ASOS manifests one of its leading business purposes by fostering small clothing brands. Thus, the online retailer launched ASOS Marketplace in 2010 with the aim of providing small retailers and designers with the opportunity to sell their creations on a credible, counterfeit-preventing platform. Additionally, this new platform aimed to introduce a reverse logistics program by allowing consumers to sell used and unwanted clothes. By October 2018, the Marketplace had sold over 100,000 items from more than 1,000 boutiques in 49 countries (Harvard Business Review, 2018). Lastly, at the heart of

[11] 1 GBP = 1, 16913 EUR as of 22-03-2019.

ASOS's business lies the 'Fashion with Integrity' movement focusing on three pillars: transparency, responsibility and inclusivity.

4.1.3. Corporate responsibility within ASOS

Conscious about its growing global reach to the younger generation, considered to be an essential factor in the transition to a CE, ASOS emphasises its passion for creating and promoting socially and environmentally responsible products. In fact, Nick Beighton, ASOS's CEO, underlines that the differentiation strategy of the company relies on offering a business model never seen in the e-commerce market. The 'Fashion with Integrity' programme and the goal of becoming a leader in changing the fast fashion movement to a more sustainable and responsible industry are at the heart of the business (ASOS Corporate Responsibility Report 2018). The company uses its powerful position on its digital platforms to slowly introduce responsible buying into customers' purchase behaviour. For this purpose, the company has been continually expanding its Sustainable Sourcing team which works on embedding sustainability across its own label and third-party brands. The team divides its sustainability programme into four essential pillars (ASOS Corporate Responsibility Report 2018):

1) the traceability of raw materials,
2) low-impact material alternatives,
3) craftsmanship by involving local suppliers and skills, and
4) engaging customers.

The first two pillars are an essential step towards circularity as the brand claims to follow the principle of 'we can't manage what we don't know'. As a result, mapping and understanding frequently used materials—such as cotton, viscose and leather—is an essential initiative to encourage and educate third-party brands as well. ASOS regularly collaborates with organisations such as the

Leather Working Group[12], the Better Cotton Initiative[13] and CanopyStyle[14]. As part of the second pillar, the British online retailer joined the 2025 Sustainable Sourcing Challenge in 2017, committing to source 100% more sustainably grown cotton by 2025. With the aim of becoming a leader in sustainable denim offerings for 20-somethings, the company sourced 80% of its cotton from sustainable, recycled and organic sources throughout 2018. The ultimate goal is to reduce its carbon, waste and water footprint in order to encourage biodiversity and prevent deforestation resulting from the fast fashion movement.

The Ethical Trade programme of ASOS intends to address and ensure the rights of workers, an essential and necessary third pillar of the company's mission in closing the loop. As part of the Eco Edit[15], the 'ASOS Made in Kenya' collection was launched in collaboration with SOKO, a clothing manufacturing unit in the Rukinga Wildlife Sanctuary in Kenya, enabling companies to hold social and environmental issues at the heart of their business. Located in the area with the highest unemployment rate in the country as well as with an elevated rate of prostitution and consequent AIDS infections, SOKO has been providing its workforce with fair wages, a decent workplace and the necessary social services.

The fourth and final pillar focuses on simplifying customers' purchase choices concerning sustainable fashion and beauty items. The Sustainable Sourcing team introduced an Eco Edit symbol at the end of the description section for customers to easily identify sustainable products. The company aims to reach £30m in value by 2020 with the Eco Edit section. The Eco Edit section, launched in 2010, represents 36 brands which offer clothing and beauty items produced with at least 50% of sustainable materials.

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[12] This group aims to improve leather manufacturing by suggesting guidelines on how to integrate appropriate, green practices (www.leatherworkinggroup.com/who-we-are/about-us)

[13] The Better Cotton Initiative (BCI) is a non-profit organization working with members basing their production on mainstream cotton farming. Together with the Better Cotton Growth and Innovation Fund, the organization has set the goal of reaching five million farmers such that over 30% of the global cotton production is sustainable and organic. Ultimately, the target aims to be reached alongside improving the economic development in the key arming areas, reduce the environmental impact of cotton production and ensure the durable implementation of Better Cotton all throughout the supply chain (https://bettercotton.org/about-bci/bci-history/)

[14] Canopy is an organization working with influential brands such as Zara, H&M or Levi's to secure ancient forests, of which 35%-60% trees are used by industries, and develop sustainable alternatives (https://canopyplanet.org/about-us/)

[15] The Eco Edit is a section on ASOS's website specifically dedicated to sustainable fashion and beauty products.

Finally, as an online retailer shipping to 238 countries from its various warehouses located in Germany, the US and the UK, ASOS's main environmental concern is carbon emissions due to the daily quantity of deliveries and packaging used. In fact, 93% of its carbon emissions are due to the transportation of goods, followed by 2% due to packaging and business travels and 3% from gas, electricity, water and waste consumption in office buildings. As the business expands and increasingly aims to reach new territories, the total carbon footprint subsequently tends to rise. As part of its 'Carbon 2020 commitment', the brand created an action plan divided into three carbon reduction initiatives, delivery emissions, packaging emissions and building emissions.

4.2. ASOS B2B marketing strategies

4.2.1. ASOS Marketplace

Circular economy opportunity

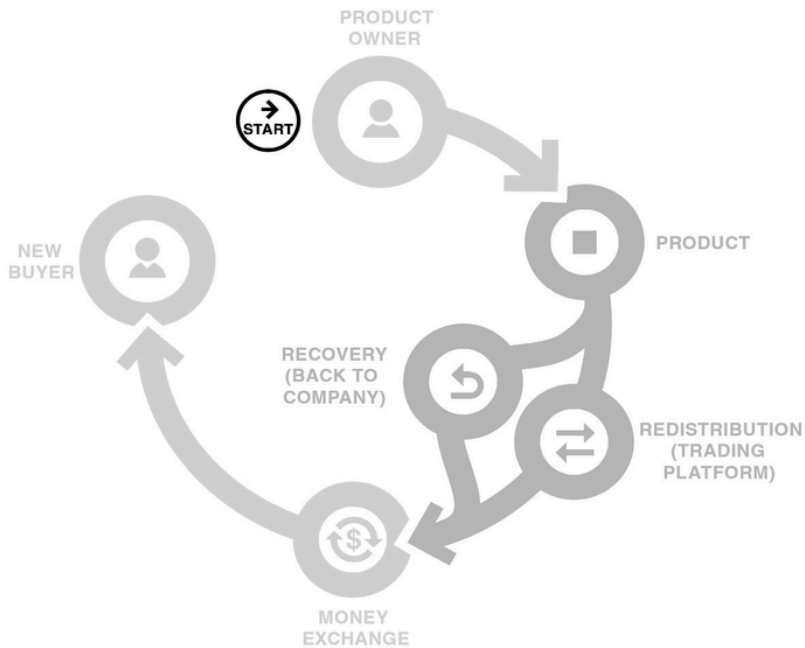

FIGURE 5: Product life extension: Resell – Waste to Wealth, The Circular Economy Advantage, 2015

The application of a reverse logistics system at the end of the SC was mentioned in the Literature Review, as an essential aspect of a GSCM tool. The scheme illustrated in Figure 5 displays the various steps to a reverse logistics system, beginning with the owned product which may be redistributed on adequate platforms or recovered by the company. In exchange, the product owner receives the invested money back, and the preowned product is offered to a new potential buyer.

Inspired by this system and driven by the alarming amount of clothes disposed in landfills, ASOS Marketplace was launched in 2010, becoming a platform for customers to resell used clothes and for vintage and sustainable start-ups to infiltrate the fashion market through a secure, highly frequented and reliable website. The ASOS Marketplace, as a complementary and extended version of the Eco Edit section, has become the leading platform for independent brands and vintage boutiques with over 800 brands. For its part, ASOS demands a £20 monthly rental fee and a 20% commission on sales. In 2018, the subsidiary platform sold over 100,000 items, which were sent to 49 countries.

Conversion of CE opportunity into a marketing strategy

Aside from partnerships with third-party brands, the online retailer considers consumers the key stakeholders in the final downstream activities, valuable components of the partnerships of ASOS with its third-party brands. The e-retailer considers reverse logistics an essential step in sensitising consumers regarding clothing disposal issues. Each delivery is accompanied by a return guide sheet explaining the return procedure and policies, featuring a small, concluding paragraph reminding the recipient about the availability and functioning of the marketplace platform. This remarketing technique—also known as 'recommerce'—when applied to online businesses, forms a new distribution channel operated by a digital community of consumers. Although such models generate revenue through longevity rather than through volume, implementing reverse logistics should be considered as an add-on service in consumers' interests. Why ASOS perceives take-back opportunities as a marketing opportunity for B2B relationships, is justified by the following two arguments:

a) ASOS offers its brands, positioned as premium-priced companies, the possibility to attract new consumers, by offering them pre-worn but high-quality, long lasting clothing items. Indeed, ASOS argues that nearly 80% of marketplace buyers eventually repurchase a specific brand on the main platform, once they experienced the quality and longevity of high priced garments. Therefore, even though reverse logistics does not generate direct revenue to resold brands on the first instance, the platform has encouraged a large portion of ASOS consumers to repurchase a new, unworn item from the same brand. With costlier products, specifically on platforms offering a wide range of price categories, the average consumer tends to be more hesitant. Buying preowned, premium-priced goods allows consumers to evaluate key aspects, such as the price-to-quality ratio and durability. Despite a consumer repurchasing a new item after first having tested the brand through the Marketplace, ASOS insists on providing consumers tips on how to wash their clothes for them to last longer. Additionally, the interviewee noted that especially with the uncertainty around the future and consequences of Brexit, U.K. consumers have been purchasing considerably fewer premium-priced items, leading to a 3% decrease in basket value and an expected, decreased sales growth of 15% for the current year, 2019, instead of the regular 20–25% ratio.

b) Moreover, the ASOS Marketplace, as previously mentioned, gives young creators and start-ups visibility amongst a wide, global audience. As ASOS increasingly searches to widen and standardise its sustainable clothing offerings, the company has been focusing on integrating popular boutiques from the Marketplace into the main platform as part of the Eco Edit section. Continuously seeking new, innovative and unique designs, ASOS believes that integrating young, talented designers and businesses will permit the ASOS brand to continue being a trend-setting platform, encouraging every type of consumer and clothing taste. Not only does the Marketplace give new, additional visibility to leading brands through its 'vintage' section reselling preowned goods, but it equally focuses on providing visibility and growth opportunities to small, sustainable businesses. The website provides a guide at the end of the page giving advice and assistance on how to customise and promote its offerings as well as on how to manage customer relationships (consult Annex II). For example, ASOS provides the possibility for independent businesses to promote their product offerings on high traffic pages. For £12, their advertisement can appear on women's and men's homepages for 24 hours.

In total, the take-back service is an opportunity for well-established brands on the main site to gain visibility and to manufacture their clothing items in a way that consumers attach attributes such as quality and durability to the brand's characteristics. If such associations are made, consumers will be more likely to repurchase on the main site allowing them to profit from longer clothing life cycles and perhaps to reintroduce an item into the value chain by reselling it on the Marketplace. As such, the marketplace offering consumers the convenience of testing items before paying the full price, gives additional visibility to third-party brands and encourages visiting consumers to search for smaller, different and sustainable brands.

4.2.2. Two-way influence

Circular economy opportunity

> Only by collaborating widely and taking bold steps together can we address the deep rooted, systemic issues, using our combined influence to create the necessary social and environmental change. (Corporate Responsibility Report, 2018, p.2)

To ensure the above-mentioned 'bold steps' were initiated, ASOS established a third-party brand programme based on four pillars. The four pillars comprise training and support, brand life cycle management, visibility and engagement and moving beyond compliance. The first pillar of training and providing support, is a crucial component for fostering progression and effective transition. As the interview evolved, the interviewee suggested this transition to be a 'two-way influence'. The response, 'It is a two-way influence', suggests the necessary collaboration and sharing between leading and non-leading partners in sustainability issues. The interviewee further explained that sustainability issues need the same type of communication as a social media communication scheme. The essential characteristic and advantages of social media rely on the opportunity to establish a daily conversation with customers, allowing them to become closer and more familiar with a brand's character. ASOS understands the effective transition to change as depending on such a two-way communication scheme.

Conversion of CE opportunity into a marketing strategy

This type of communication involves understanding how leading brands are managing supply chain transparency, confronting the organic cotton availability issue and integrating further CE values such as waste and water reduction. In the case of Monki, for instance, the interviewee points out how the brand started on their website as a non-sustainable brand but nowadays is one of the leading brands on their website. What began as a simple collaboration between an e-commerce business and a brand has now evolved into a long-lasting, mutually beneficial brand alliance. On one hand, from the perspective of ASOS, the alliance has allowed further utilisation of managerial tools to ensure that the supply chain overview and transparency increases yearly. Monki's availability to share its own research and development strategies has been essential not only for ASOS's brand development but also for the development and achievement of ASOS's desire for recognition as the leading platform for fostering sustainability in fast fashion. On the other hand, from Monki's perspective, the brand alliance has ensured a strong positioning on the ASOS website and social media accounts as a sustainable brand offering stylish and versatile clothing items. ASOS, sharing the same mission and vision on sustainability issues, states that the purchasing of Monki clothing items has been considerably expedited since they became consistently committed to organic cotton usage. The online retailer's initial strategy of focusing on offering a wide variety of clothing items, has now extended to offering a wide variety of clothing items of which an increasing percentage is sustainable. Brands such as Monki have been increasing their offerings on the British retailer's platform and are rapidly becoming leaders in their annual digital sales.

ASOS's sourcing teams, Sustainable Sourcing and Ethical Trade, work closely with third-party brands and organise workshops and training programmes one to three times a year to meet higher sustainability standards. In 2018, the online retailer organised an event named 'Future of Fashion: Transformation through Collaboration', which was attended by 80 third-party brands and covered topics such as the changing consumer, workers' rights and sustainable materials. As the title of the conference suggests, the objective was to provide a space for open discussions and the sharing of difficulties and achievements so that new insights and opportunities could be provided.

In addition to the ASOS sourcing teams, the training and series of events are done in collaboration with the leading third-party brands selling on the British retailer's website. Brand such as Monki, Levi's, Adidas and Weekday have been key partners in the establishment and influence of such training programmes.

Their joint R&D work contributes to a greater and more effective pressure on brands lacking basic sustainability policies. The objective of these programmes and events also relies on challenging uncommitted brands into perceiving sustainability policies as a current competitive advantage and a future necessity to stay relevant and attractive.

4.2.3. Brand life cycle management and co-branding

Circular economy opportunity

As part of its strategy to influence its third-party brands to slowly commit to sustainable production, ASOS is proposing a co-branded collection. As part of ASOS's Third-Party Brands programme launched in January of 2018, the Third-Party Brands team divided the ethical trade and sustainability programme into four pillars aforementioned. The team's brand life cycle management enables the planning and choice of partners for such exclusive collections. The later concept of brand life cycle management consists of overseeing and keeping track of the entire life cycle of brands featured on ASOS.com and the ASOS Marketplace site. To foster sustainability and ethical standards on its platform, the company actively supports third-party brands that include ASOS's five minimum requirements[16]. This support involves tracking brands' life cycle data such that both the retailer and the featured brands have a specific and useful idea of how their commitment is progressing. In accordance with the progress made, the online retailer can offer support and training. This co-branding strategy aims to reinforce ASOS's positioning as an e-retailer offering pieces exclusively available on its platform and challenging partners to constantly innovate their designs and product development. Through such an assessment tool, both parties can time and plan exclusivity deals to address and fulfil an existing gap in ASOS's and the brand's product offerings.

[16] The five minimum requirements demand: an Ethical Trade Policy, Transparency of 'Tier 1' meaning a list of factories, comply to the regional chemical regulations, an Animal Welfare Policy as well as a Modern Slavery Statement if operating in the UK (https://bit.ly/2HPzdnD)

Conversion of CE opportunity into a marketing strategy

ASOS introduced, in collaboration with Puma, a 'Puma Exclusive to ASOS' sportswear and loungewear collection in September 2018. The collection proposes a 100% organic cotton collection for both men and women and aims to introduce an innovative style, colour scheme and textile choice to Puma's usual offerings. The vivid, pastel-coloured collection was perceived as an opportunity given the increasing sales the platform witnessed over the previous year (consult annex IV)

With the launch of its own activewear, ASOS seized the opportunity to closely assess the progress of leading activewear brands on its platform. This assessment served to understand both what trends were being offered by competing brands to the ASOS activewear and if there was a gap in terms of design and material offerings. Launching its own activewear brand simultaneously with the 'Puma Exclusive to ASOS' collection aimed to attract consumers' attention to a specific category of the platform's product offerings and to fortify its positioning in the sportswear market.

While Nike and Adidas offer double[17] the clothing, sportswear and footwear as Puma, ASOS saw Puma's recent resurfacing with its successful footwear as an opportunity to readdress its positioning on digital platforms. As a result, the 'Exclusive to ASOS' collection aimed to differentiate the brand's offerings through a range of sustainable cotton clothing. ASOS offered Puma a progressive transition into the sustainable materials market. Such an exclusivity deal allows both the retailer and supplier to test a new market and progressively scale up the volume of the relevant offerings. The collection allowed the platform to assess the demand and perception of consumers towards sustainable sportswear, and it enabled Puma to test how a rise in commodity prices affects the company's profitability as well as to what extent it forces a considerable price increase for customers. The short-term collection allowed ASOS to confirm that there is a high demand for sustainable options because a large portion of the collection sold out quicker than expected and simultaneously triggered ASOS's sportswear brand's sales. Puma differentiated itself from its main competitors, Nike and Adidas, by

[17] ASOS offers 1,482 Nike products, 1,151 Adidas products and 584 Puma products. (www.asos.com)

becoming the only brand amongst the three rivals to offer over a hundred sustainable clothing pieces on ASOS.com.

4.2.4. E-commerce: The power of influencers and social media profiles

Circular economy opportunity

As mentioned, ASOS suggested the importance of two-way communication, both from B2B and B2C perspectives, as key to clarifying the broad concepts surrounding the topic of sustainability. As a result of focusing on becoming the leading e-retailer amongst Millennials and Generation Z, ASOS's branding and sensitisation strategy has integrated social media as an essential part of the strategy. Over the past years, the online retailer has turned its social media profiles into its primary source for informing and contacting consumers. Followed by over 20 million social media users throughout the different social platforms, the company dedicates a considerable part of its budget and time to customer relationship management (CRM) activities as well as to social media content. This digital content aims to use marketing activities as an educational tool, which they perceive as being key for the standardization of CE in consumers' mindset.

In between this variety of posts promoting diversity and ASOS's capacity for serving a wide range of tastes, feature posts marked with a recycling symbol indicate products related to sustainability. These posts vary from tips on how to make clothing items last longer to sustainable brands' indications or product suggestions (consult annex V.1.). As the British e-retailer suggested throughout the interview, presenting sustainability as an integrated component of its product offerings, instead of as an occasional and time-limited product line extension, is a crucial step in the user experience and education. The company's dedication to regularly sharing posts featuring sustainable products and their materials as well as tricks to lengthen the clothes' life cycles gives the platform credibility and eases consumers' search for such products.

Conversion of CE opportunity into a marketing strategy

The posts include and display the various brands offered on the website, underlining their eco-friendly characteristics through colloquial and humorous language:

> Organic cotton
> You know, like the good stuff in the supermarket
> Uses less pesticides to grow
> which means a happier and healthier planet
> Main: 99% Organic cotton, 1% Elastane
> (https://bit.ly/2Dw5Cf2)

The interviewee stated that since Instagram—the social media outlet through which ASOS witnesses the most interaction—launched the 'story' feature, the company has included content marketing as a strategy to educate users by approaching the topic in their usual informal and simple language. This feature, recently introduced by the platform, allows users to ask questions and answer polls and establish an interactive communication. Content marketing, defined as a leading contemporary marketing paradigm, especially on social media platforms, focuses on creating valuable content that fosters interaction and curiosity amongst the target audience. These 'Instagram stories' intend to approach the broad topic of sustainability in the form of content marketing by providing a brief explanation of the origin of specific materials and ASOS's commitment (consult annex V.2.). Not only does content marketing foster brand awareness, but, most importantly in the scope of this topic, it allows brands to make users familiar with a complex and broad topic and product offerings.

4.2.4.1. Influencers: Modernisation of eco-fashion

In addition to its social media communication strategy on its own profile, ASOS regularly collaborates with the so-called 'ASOS Insiders', reaching nearly 12 million users. Commonly known as 'influencers', these users manage their own social media profiles but with the same caption[18] style as the official ASOS profile.

[18] 'Caption' designates the text users put under their Instagram photos.

Every outfit description adds the link or reference number of the displayed clothing items. Insiders profit from exclusive benefits such as access to special events and discounts. This program shifted the traditional marketing conception of controlled, promotional message delivery by engaging in providing positive brand experiences such that positive, unpaid exposure is generated. ASOS, claiming to be a brand encouraging inclusivity and diversity, perceives its Insiders as real-life, everyday models inspiring their audiences to give voice to their diverse clothing tastes. Consequently, through these profiles, the company aims to standardize sustainable product offering and naturally engage sustainability topics in the usual digital content.

In addition to ASOS's Insiders, the company works closely with YouTube influencers as well as social media influencers reaching a wide audience on the various social media platforms. In fact, ASOS perceives online communities and their connectivity to influencers as crucial in establishing a certain credibility and transparency. As Kotler points out in Marketing 4.0, 'Social circles have become the main source of influence, overtaking external marketing communications and even personal preference' (Kotler et al, 2017, p.7). These 'social circles' established online may be considered as a group of users sharing a common interest and identity to which more and more brands try to reach out. The British online retailer considers these communities as a new segment, accelerating market dynamics in which it is difficult to stand out alone. Influencers and Youtubers build a virtual community based on common values and tastes, so that presenting sustainable options through these figures increases consumers' curiosity and, most importantly, their trust in the featured item's quality.

Both influencers and social media activity have been key factors mentioned various times by the online retailer as being decisive in the education of consumers and the visibility of brands. Perceiving social media platforms as the primary source of information nowadays, ASOS has considerably lowered its advertising costs since considering digital media to be the most effective and influential sources. At the same time, brands featuring on ASOS's website profit not only from the set of values communicated by the retailer but also from its commitment to educating consumers on sustainability issues.

4.3. Discussion

In conclusion, ASOS's 2018 corporate responsibility report underlines important statistics: 46% of Generation Z would be willing to spend more on a sustainable product whilst 31% have boycotted a specific brand because of their unethical and environmental damaging practices. In addition, 85% of Generation Z consumers would more likely trust a brand supporting a social or environmental cause. The company sees the consumers' concerns regarding ethical and sustainability issues as a crucial matter to address: 'So we're taking steps as a brand and as an influencer in our industry to make this reality' (ASOS' Corporate Report 2018, p.18). Both designations of influencer and brand, point out the possibilities the e-retailer aims to foster in the transition of regular brands to green-oriented ones:

1) ASOS's exclusivity deals and sustainable brands featured on the Eco Edit section and Marketplace form a consistent and clear message to consumers as well as to regular competing brands on the platform. As a brand, ASOS and its green-oriented partners form a corporate, digital identity built upon values such as commitment to giving a voice to a younger generation's concerns and subsequently directing the fashion industry towards a greener path. On a platform such as ASOS, targeting a young and fashion-conscious generation also involves becoming the triggering component in making sustainable clothing an offering that is as attractive, inspirational and fashionable as regular clothing items. Unlike their competitors, green-oriented brands form a coalition, a brand community necessary to build a desire and standardisation for sustainable fashion. The constant connectivity of consumers should be used as a means to approach a digital community with the values of a brand community. Belonging to a brand community can create a need, curiosity and possible loyalty which incentivises companies to collaborate to strengthen the fashionability, availability and product diversification of sustainable fashion. On the other hand, such brand communities create an incentive for regular brands to engage in a mimicking strategy, which creates a healthy competition. In this way, sustainable fashion engages in the same vicious cycle as regular fashion. Brands imitate others and fight

over price competitiveness, but at the same time, the vicious cycle has a positive impact on the environment.

2) Moreover, this same incentive of creating a digital brand community generates an increased demand for organic cotton and other sustainable resources. Therefore, the same mimicking strategy adopted by competing brands may be applied to and adopted by the suppliers of raw materials. By incentivising brands to adopt a greener production, ASOS ultimately increases the demand for innovative and sustainable materials. If, as ASOS expects, the necessity to belong to a sustainable brand community on ASOS for the purpose of diversification and adding value rises, non-green-oriented brands will face an increase in suppliers offering, amongst others, organic cotton; access to raw materials will, consequently, be facilitated. With a constant and systematic demand for organic cotton from manufacturers, prices could counterbalance and become more attractive than conventional cotton. Additionally, the workshops organised by the Sustainable Sourcing Team aim to communicate the idea that an SCM seeking transparency of raw materials and working conditions will, inevitably, be necessary in the near future when the demand for sustainable clothing will eventually equal the current demand.

Consequently, ASOS, as a brand, allows the co-creation of a digital, green-oriented brand community, distinguishing the e-retailer from competing platforms as well as challenging and influencing other third-party brands. By displaying sustainability as an attractive competitive advantage, ASOS attracts B2B relationships though the successful examples of competitors. Nevertheless, the suggested brand community incentive followed by a potential increase in sustainable raw material supply also evokes gaps and important questions.

1) Firstly, from a GSCM point of view, a power asymmetry, not between supplier and retailer as suggested in the Literature Review, but between retailers is still perceivable. The second step suggests co-branding as the intermediary stage linking upstream improvements to downstream activities. In fact, the 'Exclusive to ASOS' collections introduce ASOS as

both a brand and an initiator. From a brand perspective, the co-branding strategy allows both brands to benefit from each other's brand awareness and visibility as well as its value set. The 'Exclusive to ASOS' collections are completed in collaboration with well-established brands such as Puma and Cheap Monday. The independent, green-oriented brands featured on the Marketplace, however, do not feature in the range of 'Exclusive to ASOS' collections or in the Eco Edit category of the main site. There is an emergent need for established, well-known brands to become aware and attracted by the circular business model. However, ASOS should challenge these brands not only by providing successful examples of competing brands but also by integrating such independent brands, featured on Marketplace, on the main site as an integrated element of their product offerings. The integration will not only strengthen ASOS's image as a diversified platform fostering innovative design and creative freedom but also ease consumers' search and capability to compare product offerings.

2) Finally, ASOS's strategy based on offering diversification through the introduction of a sustainable range opens ambiguous opportunities. Whilst a mimicking strategy between e-retailers would increase market dynamics and foster the durable implementation of green practices, it would also significantly harden ASOS's aim to be a leader in trend-setting and offering the latest designs. Platforms such as Zalando, Net-a-Porter and Amazon also host products from influential brands, including Nike, Puma, Adidas and Cheap Monday. Part of the attributes creating their distinctive value propositions is an enriched co-branding strategy through exclusive designs and raw material selection. For this reason, ASOS's value propositions would always have to be one step ahead of those of competing platforms in terms of GSCM, resource selection and designs.

4.4. Orange Fiber

4.4.1. Contextualisation

Driven by citrus waste management issues, particularly concerning southern Italy, the founders of Orange Fiber aimed to address these issues whilst contributing to sustainable technological innovation in the fashion industry. The Italian start-up saw cellulose[19] pulp from citrus by-products as a cheap, wasted but added-value resource to introduce a differentiated business purpose. Relying on a process of resource recovery, the production procedure extracts cellulose apt from disposed oranges to create a polymer[20] pulp ready to be spun into yarn. The resulting lightweight, silky and viscose-like textile is suitable for every type of clothing item production as well as for traditional printing and dyeing procedures (http://orangefiber.it/en). Sharing the dream of joining their passion and skills for fashion design and social entrepreneurship as students, to tackle the issue of citrus disposability in their country and Sicilian region, the founders, Adriana Santanocito and Enrica Arena, first developed and patterned this process of cellulose extraction and spinning in Milan in 2012 in collaboration with the Politecnico di Milano. With the 'Smart & Start funding' established by the Italian Ministry of Economic Development, Orange Fiber invested in its first piloting plant in Sicily in 2015 where the initial resource recovery processes take place. The so-called pastazzo resulting from the cellulose extraction then leaves the factory to be spun in Spain. The resulting yarn returns to the company which finalises the procedure in Sicily.

The company's exclusive textiles were introduced into the luxury market on the 22nd of April 2017 on the 47th Earth Day, in collaboration with Salvatore Ferragamo, and launched as the Ferragamo Orange Fiber Collection. The capsule collection, enriched with the designer prints of Mario Trimarchi, was conceived with the shared passion for creative innovation and decades of heritage of Italian

[19] Cellulose defines the substance prevailing in the cell walls of plants usually used for paper, fibers and plastics production.
[20] Polymer defines a molecular structure composed of a large number of bonded units occurring naturally such as cellulose or artificially such nylon (Oxford Dictionary).

excellence. The exclusive pieces and prints aimed to create 'a hymn to Mediterranean creativity' (www.orangefiber.it/collections).

4.4.2. Mission and vision

Determined to actively contribute to a circular fashion industry, the Italian start-up set itself the objective and mission to combat waste generation issues, especially those affecting Italy, by considering them as an opportunity to innovate models of textile production. In accordance with its 'responsible passion' motto, the business model seeks to 'merge scientific research with fashion', an essential merge to foster sustainability in the textile industry (www.orangefiber.it/collections). The company's vision highlights the underlying purpose of linking sustainability with technological innovation and quality. Actively aiming to become leaders in law-impact raw material processing, Orange Fiber seeks to transform by-product textiles into a new, high-quality and refined standard in the luxury industry.

4.4.3. Citrus disposal in Italy

As part of the European Commission's Climate Actions Plans, the national 'Life Food Waste Stand-up' programme aims to sensitise and educate Italian industries and end consumers on how food waste may be reintroduced into the SC and used as feedstock (http://www.lifefoodwastestandup.eu/en). The programme's research and statistics indicate 5.6 million tons of discarded food generated yearly, mostly—up to 57%—by industrial actors. Of the 57%, 37% of the industrial waste occurs at the very early stages of the SC, as the raw material is processed first, and 13% occurs when the final product arrives on retailers' shelves. Eventually, the final Italian consumer generates 43% food disposal, of which only 8.6% is donated to charities (http://www.lifefoodwastestandup.eu/en).

In the scope of this case study, the citrus disposal also exemplifies alarming statistics. Citrus processing is valued at €1.4 billion, one third of the value of the total fruit sector of the country. In Sicily, whilst agriculture is considered the main economic activity of the region with a production of over 2.1 million tons, the orange plantations account for over 1.4 million tons, representing 49% of Italy's national orange processing (Coca-Cola 2016 Sustainability Report). Moreover, citrus production and processing are considered the main contributor to the island's gross domestic product. With a global disposal rate of the by-product of oranges reaching approximately 700,000 tons per year in Italy, up to 60% of oranges are wasted after squeezing and, consequently, are left releasing aggressive, natural gases harmful to the air and soil (consult appendix II.1)

4.5. Orange Fiber B2B marketing strategies

4.5.1. Sustainable production: A service offering

Circular economy opportunity

Companies such as Orange Fiber offer businesses not participating in the sustainability market a diversification and differentiation opportunity. Orange Fiber's collaboration with Ferragamo offered the luxury retailer a related diversification, engaging the designer's activities in product development and a line related to their existing business production. Likewise, a differentiation strategy relates to the possibility for brands to distinguish themselves from the competition due to distinctive product attributes and characteristics.

Considering this, as more than a differentiation and diversification opportunity, suppliers offering sustainably made basic materials are cultivating the idea of sustainability as a service offering to regular markets. When asked about the perceived positioning both in the collaborative SC as well as in the CE context, the interviewee stated:

> In the near future, we will focus on continuing to test, improve and upscale our business idea, based on the basic characteristics of CE in order to consolidate our presence as a service offering business in the sustainable and innovative tissue market. (consult appendix II.1)

The idea of Orange Fiber as a service-offering enterprise is justified by the major barriers regular businesses face when planning to approach the sustainability market.

As previously stated, applying a GSCM involves high costs driven by the necessity to reorganise logistical and production habits. Alternatives to regular raw materials, as well as the R&D needed to process these such that they meet the usual demand and customer exigencies, demand a high capacity of financial investment. Orange Fiber's business idea understands that the interests of regular businesses should be driven by the logistical and financial advantages sustainable suppliers may offer.

Conversion of CE opportunity into a marketing strategy

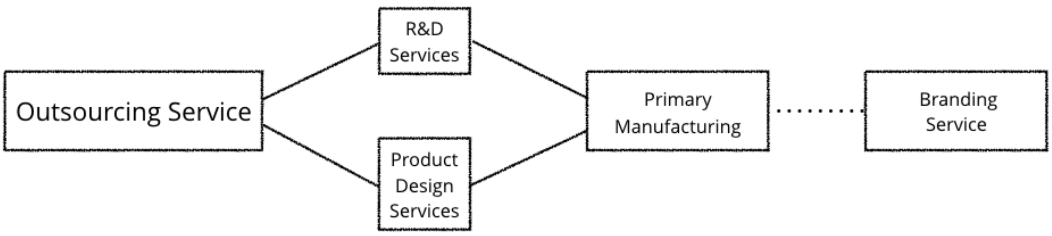

FIGURE 6: Orange Fiber's service offering - self-elaborated

As illustrated above, Orange Fiber perceives itself as a company offering (domestic) outsourcing services which consist of providing the buying partner their R&D, product design and primary manufacturing service. After the primary manufacturing, meaning the transformation of the yarn into ready-to-use textile, the buying partner—in this specific case, Ferragamo—is delivered a product behind which there are 3 years of R&D and product development as well as logistical and infrastructural procurement. Whilst the supplier focuses on continuously upscaling and improving the processing techniques, the industrial buyer procures itself a tissue ready to be used and dyed with the same procedure as other, traditional materials, not requiring any specific infrastructural rearrangements. In sum, although its textiles are more expensive than regular cotton, the supplier believes that its services will become more advantageous over the next few decades as the price volatility of cotton and oil-based materials will considerably challenge stable production costs. With collaborations such as the Ferragamo Orange Fiber Collection, as well as institutional funds, the Italian start-up is seeking to improve its techniques in order to lessen production costs and increasingly compete with the regular textiles that currently dominate the fashion market.

The underlying branding service, presented as the end stage of the service offering, regroups the following advertising strategies the distinctive business model offers, such as ingredient branding and referral marketing.

In conclusion, not only does Orange Fiber provide its clients with a spectrum of marketing activities, but it also focuses on suggesting the idea that the transition to CE may become easier, more attractive and, most importantly, cheaper for regular businesses.

4.5.2. Co-Branding: The power of corporate identity

Circular economy opportunity

First, co-branding strategy may be defined as a brand alliance: 'a strategic alternative to a brand extension' (Tilburg et al., 2015, p.1) which associates for the short or long term two or more brands. Joining brands usually participate in the same product category creating a product-product fit as well as a brand-brand fit, as exemplified by this first case study. Both Orange Fiber and Salvatore Ferragamo participate in the textile category and are positioned as premium-priced brands in the fashion industry, therefore, creating a product-product and a brand-brand fit. With Orange Fiber's citrus by-product textiles, the capsule collection also signifies a new product-brand fit. The collection enabled Orange Fiber and Ferragamo to introduce a new product whilst drawing attention to common values and characteristics. Both brands represent Italian artisanship, united by their passion for the Sicilian region as portrayed throughout the collection.

Whilst, the Italian luxury designer engaged his image and identity in sustainability issues and transmitted his concerns about the future of the industry to the final consumers, Orange Fiber associated its image with Italian artisanship and tradition. However, corporate image and identity not only builds or merges a set of values that are later transmitted to the final consumer, but they also drive a shift in supplier-retailer relationships.

Conversion of CE opportunity into a marketing strategy

Creating a win-win situation for both investors involves benefiting from the strategic coordination of the core business functions of both parties for the purpose of improving the long-term performance and visibility of the individual and joined companies (Akerberg, 2015). The concerns rising lately about the transparency of SC activities manifested by consumers open opportunities for suppliers to create a distinctive business model proposition generating a distinguishing and unique brand (Joy et al., 2012).

Salvatore Ferragamo approached the concept of GSCM by converting the once invisible or oftentimes neglected image of a textile supplier into an opportunity for uncommon product labelling, market differentiation and value creation. As the name and labelling of the capsule collection stresses, Ferragamo Orange Fiber Collection, the collaboration rebalances the traditional supplier-retailer relationship. Whilst Ferragamo profits from the labelling to highlight its transparency and corporate responsibility polices, Orange Fiber shifts the invisible positioning of conventional suppliers by positioning itself and its name as an integrated aspect of the value proposition:

> The success of this partnership has considerably contributed to introduce our textiles to the fashion industry and to sensitise designers and brands to use sustainable materials. It also opened the route for us into future collaborations capable of conferring suppliers a new positioning and role in the fashion market. (consult appendix II.1).

Even though Orange Fiber considers itself a B2B company mainly acting within the luxury fashion brand, its inevitable secondary target is the final consumer. For this reason, its market penetration strategy involves offering potential partners a green label constituted of a set of differentiated values and materials. Ultimately, in order to shift the power and visibility attribution in a supplier-retailer relationship, B2B business models should consider a B2B2C model, promising a unique selling proposition attracting both the partner and the final consumer.

A well-defined brand-supplier hierarchy during a co-branding engagement may foster a network marketing strategy. Perceived as a part of relational marketing, network marketing refers to the development of a relationship between firms belonging to a network with the aim of exchanging mutual benefits and resources. The engagement of both Italian companies relies on the advertising benefits provided by the unique textile production of Orange Fiber in exchange for an entry ticket into the luxury market network. The initial co-branding definition involving the strategy as an alternative to brand extension and offering the possibility to provide a distinctive, new product may be complemented by the concepts of network marketing and power equality.

4.5.2.1. Generational diversification

A corporate identity inevitably joins two types of consumers. The collaboration between both the Italian supplier and the retailer has allowed a product differentiation for Ferragamo and a generational diversification for both parties. Questioned on the company's perspective on the role of marketing in the shift of linear economic models to circular ones, Orange Fiber stated the importance of marketing communications as key, particularly amongst Millennials. The feedback received since the launch of the capsule collection underlines a great interest of millennial audiences in new tissues and purchase possibilities.

At the same time, the luxury designer has been facing sales revenue losses, losing 42.4% in net profit (Salvatore Ferragamo financial annual report, 2017). Since the end of 2015, the Florentine fashion maison has been struggling to achieve positive financial results whilst competing maisons such as Gucci and Saint Laurent shifted towards a graphic logo appeal in their apparel and accessories offerings, contributing to consistently increasing growth (Forbes, 2018). Unlike its competitors, Ferragamo has not constantly sought to innovate its core products according to the millennial audience's tastes whilst maintaining its legacy, a timeless strategy that has allowed brands such as Hermès and Chanel to safeguard their sales revenues and net profits from considerable falls.

In conclusion, with the increasing media and social media coverage of climate change issues and the fashion industry's major contribution to environmental pollution, the collaboration has allowed Ferragamo to engage its traditional style with a contemporary concern. The Ferragamo Orange Fiber collection has enlarged the target segment to a younger generation. As the interviewee underlines, as consumers increasingly match fast fashion items with statement, classic and luxury pieces, the collaboration aims to respond and serve this current trend by integrating distinguishable black and white illustrations. All in all, the co-branding option has allowed Ferragamo to advance with a mimicking strategy to regain a positive share of the market and the millennial audience with seasonal, limited quantity garments to test consumer purchase behaviour.

4.5.3. Ingredient branding: educational role of marketing

Circular economy opportunity

'As the secondary target is represented by the clients of the Luxury Fashion Brand, Orange Fiber has become a B2B2C company, based on an ingredient brand strategy' (consult appendix II.1).

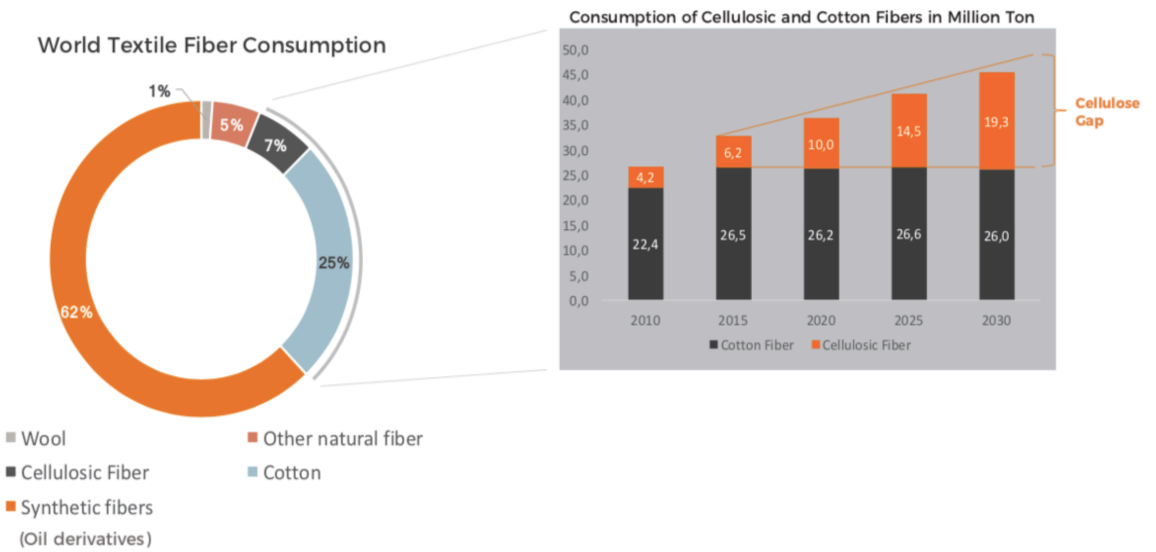

FIGURE 7: World fiber market: how cellulosic fiber is the future response to cotton fiber price volatility - Source: "Global Forecast to 2020" by MarketsandMarkets

As addressed in the second subchapter of the Literature Review, the cotton market has been suffering from price volatility due to climate change issues, including floods, droughts and plague of insects. Consequently, the synthetic fibers derived from chemical production based on petroleum, such as acrylic and nylon, have increasingly become the most consumed types of textile in the industry, as the first graph of Figure 4 illustrates. However, as indicated in the second graph of Figure 4, the demand for cotton fibers will continuously rise, creating an attractive gap for cellulosic fibers based on natural polymers to enter the market.

Conversion of CE opportunity into a marketing strategy

The zero-waste business model operating with citrus by-product disposal permitted the Italian start-up to establish an ingredient marketing strategy based on the storytelling of environmental concerns. The production's principle ingredient embeds a set of marketing strategy opportunities. One of these opportunities involves selling to partners the story behind the product procedure and the attached sentimental value. The following extract is the description of the creation and meaning of the collection given by the Ferragamo group:

> Ferragamo, from the very beginning, wanted to dedicate a unicum to the project. They asked Mario Trimarchi (Com-passo d'Oro 2016), architect and designer of the *a mano libera-free-hand generation*, to interpret his images with their strong Mediterranean influence into prints that could capture the most authentic origins of Orange Fiber. The result led to a sophisticated study that focused on an extraordinary, almost metaphysical Sicily. Inspired by the theme of the intense shadows of the South on Mediterranean nature and fruits, he also adds a more abstract and literary sequence of drawings of floating clouds and flowers. From these authentic designer prints, the Ferragamo stylistic team brought forth a collection made of essential cuts and lines applied to shirts, dresses, trousers, and foulards, with the style of a delicate daily wear that embraces naturalness and comfort. A surprising result, particularly refined and delicate, that links prints, fabrics, and styles with a virtuous production process, confirming that Italian creativity and ingenuity can work with sustainable fashion to safeguard the planet. (www.ferragamo.com/orangefiber)

This extract demonstrates how Orange Fiber provides its partner with an ingredient marketing opportunity based on transforming the principal ingredient into a kind of subsidiary brand of both the supplier and the retailer. Ingredient branding may be understood as 'the marking or labelling of components or other industrial goods' in order to gain a competitive advantage (Kotler and Pförtsch, 2010, p. 16). In this case, the orange involves Ferragamo in a discourse of national endorsement, carefully selecting typical Mediterranean attributes such as 'nature and fruits' and 'floating clouds and flowers'. Consequently, as indicated in the first lines of the extract, the 'authentic origins of Orange Fiber' are captured in the garment prints, transmitting to the final consumer a set of southern characteristics.

However, besides the opportunity of providing a set of authentic and regional values, Orange Fiber perceives ingredient branding as an essential step towards conceptualising marketing as an educative tool. More than an authentic value set, the ingredient branding opportunity offered by the Italian start-up is a tool to educate consumers on food loss and disposal. The curiosity that arises from the first encounter with the supplier should become the starting point for brands to underline the importance and authenticity of emerging, innovative business models. The literature identifies an attitude-behaviour gap mainly in the consumers' consumption habits, but the same concept may be applied to B2B activities, as Orange Fiber indicates during the interview. Although businesses and consumers start to value sustainability and transparency, the purchase and production behaviours do not reflect the increasingly conscious mindset (Dickenbrok and Martinez, 2018). Consequently, the literature identifies communication as the source of this attitude-behaviour gap. Customised communication promoting distinctive characteristics of sustainable production is a key issue to be addressed in both the B2B and B2C sector (Dickenbrok and Martinez, 2018).

4.5.4. Referral marketing: An internationalisation tool

Circular economy opportunity

Using a traditional, unidirectional communication model, the B2C sector communicates with a passive buyer whose perception may be influenced by a brand's image, popularity or word of mouth. The B2B sector with a constricted number of partners, in contrast, faces a considerably smaller influence on the potential buyers. As Webster and Wind (1992) explained, the B2B decision process involves 'establishing the need for purchased products and services and identifying, evaluating and choosing among alternative brands and suppliers'

(Fill, 2006, p.166). Therefore, establishing a referral marketing strategy in the B2B sector demands a distinctive selling proposition for the buyer, potentially attracting various influential parties in the industry. As more competitors of a brand perceive a product offering as difficult to imitate or counteract, there are more profits for the supplying party profits from gratuitous but decisive advertisement opening doors to future projects.

Similarly to the B2C context, industrial buying is predominantly governed by a rational review of an internal objective and the various alternatives to respond it by obtaining maximum profitability. However, as the B2C context indicates, along with rational arguments, word of mouth and brand image are powerful assets, regularly uncontrollable for businesses and able to considerably influence purchase behaviour:

> It is clear that industrial purchasing decisions are not solely governed by a rational review of the problem posed if 'rational' is to be interpreted as a long, fully considered view of all possible alternatives in order to obtain maximum company profitability' (Brand, 1972 cited in Blombäck, 2005, p.49).

Whereas the literature distinguishes B2B marketing as a relationship management strategy, this study introduces referral marketing as the complementary and crucial strategy accompanying rational assets such as relationship management and value proposition.

Conversion of CE opportunity into a marketing strategy

Consequently, Orange Fiber's patented and unique textile production offers B2B buyers and collaborators a distinctive value proposition through which the Italian supplier profits in the form of referral marketing. In order to obtain maximum company profitability, Orange Fiber intended to develop a by-product processing offering a textile suitable 'according to designers' needs and clothing categories' (consult appendix II.1). However, the Italian company is focusing on 'completing their research and development processing aiming to optimise the costs of production, scaling up the technology to replicate abroad' (consult appendix II.1). As luxury fashion offers a limited number of pieces during a given season, Orange Fiber seizes the opportunity to engage in capsule collections to set foot in the industry whilst gathering additional know-how about the industry's specific needs and opportunities.

After the company was introduced into the market with capsule collections such as the Ferragamo Orange Fiber Collection, it was added as a portfolio company of Future Tech Lab (FTL) Venture[21], a global capital fund helping new, innovative and sustainable technologies to create products. In addition to financial support, the collaboration has given the company a voice and role model positioning in international summits and conferences. The 'Good for the Earth, Good for the People' sustainable fashion conference, organised by the Library Study Hall and supported by the UN's Office for Partnerships and SDGs, took place in New York on the 1st of February 2019 and featured Enrica Arena, co-founder of Orange Fiber. Marking the official start of New York Fashion Week, the conference aimed to draw attention to topics concerning circularity. The co-founder of the Italian company participated during the talk series called 'Good for the Earth: Environmental-Centered Solutions' approaching the issue of how to link the fashion industry with the SDGs (http://orangefiber.it/en/blog/).

Additionally, the garments designed and sold in collaboration with Salvatore Ferragamo were exhibited in the Victoria and Albert Museum in London from the 21st of April 2018 until the 27th of January 2019 as part of the 'Fashioned from Nature' exhibition. Gathering 300 pieces created by noteworthy designers such as Cristian Dior, Vivienne Westwood and Dries van Noten, the exhibition aimed to highlight fashion's environmentally endangering response to increasing demand. Along with covering over 400 years of textile production and raw material sourcing, Fashioned from Nature dedicated a section to the most successful, sustainable creations of the past decade. Present amongst the Ferragamo Orange Fiber Collection pieces were Calvin Klein's famous Met Gala dress made from recycled plastic bottles and worn by Emma Watson and Stella McCartney's gown created from grape waste, a leather-substitute material based on a waste recovery procedure by VEGEA (http://orangefiber.it/en/blog/)

In the specific case of Orange Fiber and its collaboration with the Italian luxury designer Salvatore Ferragamo, the capsule collection allowed the Italian start-up

[21] Founded by the fashion and digital entrepreneur Miroslava Duma, FTL gathers 50 start-ups and over a hundred technologies empowering them financially and scientifically to help shift the industry to a socially and environmentally respecting one. (www.ftlab.com)

to showcase a unique value proposition whilst establishing an important relationship with both the sustainability market and the luxury industry. The collaboration not only allowed the brand to set foot in the industry but also to adapt its production procedure and textile to the industry's specific needs, enriching its value proposition. Additionally, the relationship established with the Ferragamo Group spread the word about the Italian citrus textiles throughout the luxury and sustainability industries as Ferragamo was the first designer to seize the opportunity of utilising citrus fabrics to reinvent luxury textiles: 'Salvatore Ferragamo has been the first designer brand who has seized the potentials of our citrus fabrics […]. This collection is an important milestone for our company and the first step in the international fashion market.' (consult appendix II.1). This internationalisation process began as soon as the capsule collection launched, giving Orange Fiber an important voice in international summits and exhibitions.

The collaboration with the Italian designer resulted in considering referral marketing as a part of Orange Fiber's strategy to further penetrate the luxury and international markets. As a global problem reaching over 16 million tons per year, the disposal of citrus by-products supports the citrus processing company's internationalisation process considering that Italy produces only 4% of global citrus juice. Indeed, 80% of the worldwide citrus juice production is concentrated in the US, Brazil, India and Mexico. Through its unique production proposition and established relationship with the luxury and sustainability industries, this internationalisation opportunity emphasises the importance of the rational decision-making process of partners. Whilst Ferragamo identified a unique opportunity for the brand to diversify itself, Orange Fiber seized the opportunity to build itself a reputation predominantly fed by the referral marketing strategy generated by its partner.

4.6. Discussion

> We propose to not only transmit the characteristics of our products, but most importantly, to transmit the added value offered in terms of storytelling, ethical values as the core of our project, the production processes and the experience. (consult appendix II.1)

The above citation underlines how the application of a GSCM in the business model of Orange Fiber, aims to provide its collaborating partner, not only the basic marketing benefits greener raw materials generate such as green labelling but also, a holistic experience of the potential of the sustainability market. As suggested in the third subchapter of the Literature Review, Mudami (2002) suggests three essential attributes for industrial buying: the brand, the product and the augmented service. As the above citation and the strategies suggest, the business model and the raw material of Orange Fiber, inevitably, offer a distinctive brand image built upon a specific and unique product, resulting in it becoming a service offering for brands searching for diversification and sustainable market testing. The strategies have suggested how the embedded value in citrus disposal may evolve into real artisanship, offered as a service for upstream and downstream activities. Consequently, if a future outlook is considered by taking into account the previously mentioned strategies, the potential difficulties and possibilities can be listed:

1) As the ingredient branding strategy suggested, oil-based, synthetic fibers accounting for 62% of world textile consumption will face the same uncertain and costly future as the cotton market as they also provide from a scarce, price-unstable resource. As Orange Fiber's production procedure relies on citrus waste, the company profits from three essential resource management benefits:
    1) The acquired waste is free and naturally occurring from citrus juice production keeping price volatility risk low. The so-called pastazzo in Sicilian jargon costs juice producers over $11 million to dispose of, making it an expensive waste to manage.
    2) Orange waste does not directly impact farmers the same as cotton farming. The communication of how the initial, upstream

activities function facilitates acquiring credibility from consumers as it generates fewer questions and less scepticism than cotton farming. Ethical concerns around farmers and their involved families are less present in zero-waste production models.

3) The orange disposal transformation into textiles remains a current, unique selling proposition of Orange Fiber as the production procedure is patented. Whilst the textile itself provides a 'wow' effect, the production procedure involves fewer ethical and scarce resource concerns so that the service offering of the company may be easier to integrate into the value chains of partners. Whilst the cotton market faces considerable instabilities and the organic cotton market is currently rising at a rather slow and expensive pace, waste transformation is suggested as the future solution as long as companies have not established eco-effective and durable ethical and sustainability policies throughout their SC.

However, the question remains, especially when considering a potential future outlook, how long the wow effect for Orange Fiber's contemporary unique selling proposition will last. Although, the Italian start-up has patented its production procedure, the idea of creating textile out of alimentary waste may become an attractive strategy for future businesses. On one hand, the competitiveness created through businesses such as Orange Fiber, makes the sustainability market attractive and facilitates a transition towards CE by giving a wider choice of partners to linear, traditional models. On the other hand, companies based on different production models lose their competitive advantages. The usage of orange waste as a resource may encourage other textile companies or industries to identify waste disposal as a potential and cost-beneficial option for their current business. In this case, the resource availability and price stability would be threatened. Coca-Cola, for instance, has also recognised the citrus waste crisis in Sicily as an option to extract clean energy by reusing the moist residues left by industrial production. Although waste management is an essential concern in sustainability matters, the increased usage of the same waste by various industries may threaten the value proposition in the B2B relationships of companies as the availability of the resource may be reduced.

Chapter V

Discussion

5.1. Case study comparison and final conclusions

The following discussion approaches the topics of the Literature Review chapter and begins by further analysing the various fashion movements. Afterwards, the GSCM topic will be linked to the previous topic and further analysed with the results found through the comparative case study. Finally, the last part of the discussion will address the research questions, enquiring the role of marketing in the adoption of circular business and the influence of B2B marketing incentives on consumer awareness and education.

5.1.1. Dissimilarities fostering opportunities

Both ASOS and Orange Fiber are part of international, sustainability organisations such as the Textile Exchange or the Better Cotton Initiative and have been attending influential conferences as The Copenhagen Fashion Summit (CFS), for instance. The latter has established itself as the leading event in sustainable fashion. As part of the Global Fashion Agenda (GFA), the two-day fashion summit, units the major decision makers of the fashion industry and discusses the critical ethical, environmental and social impact of the fashion industry. During the Copenhagen Summit in May 2017, ASOS firstly joined the GFA and committed to a set of practices to accelerate the transition to a circular fashion industry. During the same year ASOS was established as an official partner of the GFA, Orange Fiber was part of the GFA's first 'Solutions Lab', a space exhibiting the latest innovations in sustainable fashion.

As the fashion production is expected to increase by 63% by 2030, the CEO of the GFA underlines how, more than ever, marketing strategies need to engage in a new narrative: 'when companies implement circular principles, new opportunities arise, such as innovative design and increased customer engagement' (www.orangefiber.it). As the underneath quotation underlines, this 'new narrative' may be achieved if influential companies such as ASOS, and their commitment to SD and CE, cause a chain effect in the fast fashion industry:

> With the addition of ASOS and PVH, our Strategic Partner group has truly come full circle. We're excited to now have industry-leading representatives from all of the various segments of the fashion industry, including luxury, athletic, ecommerce, high street, mass, premium and sourcing markets. As one of the largest apparel companies in the world, with iconic brands that include CALVIN KLEIN and TOMMY HILFIGER, PVH has been setting trends for decades, influencing consumer behaviour and embedding sustainability into its business practices. And as one of the most visited fashion destinations in the world, ASOS has great influence by supporting its own and third-party brands in implementing sustainable practices, and as a retailer engaging twenty-something consumers in sustainable matters," explains Eva Kruse, CEO and President of Global Fashion Agenda (GFA report 2019, p.1)

The current focus of fast fashion companies on fostering unlimited and constant growth, is incompatible with a planet with finite resources. Consequently, the GFA's gathers yearly those who lead the current 'narrative', encouraging the vicious cycle of consumption and disposal, and those who are able to durably shift this narrative. As stated in the beginning of literature review chapter, there are currently, various fashion movements such as the slow, fast and luxury fashion. Whilst the slow and luxury fashion movement, often confused with eco-fashion, functions with fewer collections and a reduced volume, fast fashion focused on offering weekly novelties and trends, generating pollution, unethical work conditions and unsustainable consumption habits. To the four fashion movements are attributed specific characteristics, suggesting how a crossing of value chains may be the way to go to achieve the transition to a durable implementation of sustainability in the fashion industry.

In fact, the gathering of the various fashion movements during the Copenhagen Summit, underlines how a mimetic strategy between fashion movements is essential for a greener industry. As the study suggested above in the listing of ASOS' strategies, the online retailer aims to foster a competitive spirit between brands, by sharing the experience of other third-party brands committed to a greener production. In this same sense, adopting and sharing valuable characteristics of other fashion movements, may facilitate and advance the sustainability movement. Taking the example of this study's comparative case study, illustrates how a crossing of brand characteristics and production models, may challenge non-green oriented brands to penetrate and test the sustainability market.

ASOS, on one hand, has adopted the slow fashion's characteristic of limiting the quantity of specific clothing items in their 'Puma Exclusive to ASOS' collection. These exclusivity deals using organic cotton, are launched once to twice a year, as the slow fashion movement. Additionally, the exclusivity collection aimed to draw attention to the raw material used, a common characteristic of the luxury fashion. The 'Ferragamo Orange Fiber Collection' underlines the environmental and production benefits of using citrus waste and establishes an emotional link between the ingredient and the Sicilian region. Likewise, ASOS' collections using organic cotton aim to sensitize consumers about the ethical and environmental consequences of regular cotton.

Orange Fiber, on the other hand, underlines its aim to become the leader in supplying sustainable textiles, both in Italy and Europe. The Italian start-up aims to achieve this by forming a group of subsidiary brands. As the fast fashion group Inditex, currently expanding its commitment to sustainable fashion throughout its various brands, such as Pull&Bear, Bershka or Zara, Orange Fiber focuses on establishing a network of brands committed to using high-quality and sustainable textiles. This network creation is what ASOS is trying to achieve by challenging its third-party brands to differ their usual offering on the platform and introduce sustainable clothing items. As the above quotation suggests with the example of ASOS, leaders of groups play an essential role in the standardization of sustainability in their group product offering.

Moreover, the horizontal collaboration between fashion movements also suggest the need for the transition to CE to be done in collaboration, such that key activities such as R&D and product development may be facilitated and optimised with conjoint skills. In addition to the mimetic strategy, the comparative case study suggests how both fashion movements adopt a collaboration strategy to foster their as well as well the partners' transition to a greener production. As a matter of fact, both brands have engaged in co-branding strategies to penetrate the eco-fashion market. Orange Fiber as well as ASOS have associated their brands to other influential and well-established brands, in order to raise consumer curiosity and awareness towards environmental issues and differentiate themselves from competition. Both have engaged in a strategic green marketing orientation, defined as the commitment to long-term environmentally friendly actions in a business model (Papadas et al., 2017). This strategic orientation has positioned them in the fashion market as credible, committed and trend-setting companies, offering their partners the possibility to apply a short-term, tactical green strategy. During those collaborations, both companies have provided their partners skills, knowledge and a potential new target segment. In case of the Italian start-up, environmentally conscious customers have been attracted to an established, well-known luxury brand as Salvatore Ferragamo. In case of ASOS, the same phenomenon happened tanks to the 'Puma Exclusive to ASOS' deal.

Consequently, the collaboration between two brands in sustainable fashion, inevitably, calls for a GSCM and its crucial components as resource alternatives, minimisation of waste and eco-efficient productions. This study suggests, as an answer to the research objective of identifying the key activities and actors fostering a GSCM in both the fast and slow fashion movement, the following illustration:

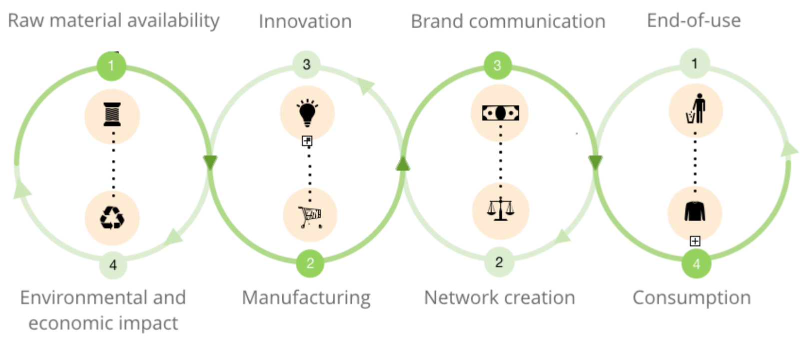

FIGURE 8: GSCM process from a marketing perspective – self-elaborated

The above dark green path illustrates the essential activities throughout a linear supply chain. The light green path picks up at the last stage of the linear chain and illustrates key activities transitioning the linear path to a circular supply chain. The above illustrated transition may be applied to any company of any fashion movement as the key activity, as mentioned above, relies in collaborating and sharing skills.

As an example, ASOS has been imitating the slow fashion characteristic of offering reduced quantities of 'Exclusive to ASOS' products, because they have been becoming aware of how their business model has been supporting the rampant generation of textile waste. As the linear model relies on a purchase-consume-dispose system, the light green path picks up at one of the most problematic stages of the fashion value chain: the after-consumption behaviour. As a consequence, their transition to a greener platform begins at the ending circle of the above illustration. From there on, they focus on joining international organizations as the GFA or partnering with third-party brands in workshops, to create a network fostering innovative and textile waste reducing business models. With their 'Exclusive to ASOS' collections manufactured with organic cotton, ASOS makes the transition to a greener platform through the first circle of the illustration. The impact of regular cotton farming on the environment challenges the fast fashion e-retailer to start innovating the online fast fashion by introducing organic cotton. Orange Fiber's commitment to a GSCM also begins at the beginning and ending circle. The orange peels are a wasted and valuable component, lost through industrial and societal consumption, which makes Orange Fiber's business model start at the very end of the illustration. At the same time, the resulting orange peel transformation in the so called 'pastazzo', also makes their business model start at the very beginning circle.

Whilst the first and closing loops underline the importance of consumption habits and industrial input as the key opening and closing components of a circular supply chain, the middle loops involve the essential actors and activities for the generation of a chain effect in the adoption of circular business models. As suggested in the above literature review, manufacturers, suppliers and retailers face considerable costs and organizational challenges when opting for a GSCM. Consequently, a horizontal collaboration between supply chains fosters the elaboration of new, more sustainable, cheaper and circular businesses (Henninger et al., 2017).

All in all, this first part of the discussion concludes that, the first step to consider when making the transition towards CE, is to observe the various fashion movements and their key characteristics. The observation of the various fashion movements may give first ideas on how to introduce the observed, valuable activities as a first step towards a GSCM collaboration. Similarly, this study witnesses how collaborations, between two brands or a supplier and a brand, have become the key activity in the transition towards a greener production. This idea is underlined with the following paragraphs which understands collaborations as the key tool causing a chain effect in the adoption of circular models.

5.1.2. Marketing incentives as a chain effect in the transition towards CE

In order to answer the main research question, which enquires the conception of marketing incentives as crucial in the adoption of circular business models, this study divides the process of incentive creation in three essential steps: value capture, value creation and value delivery. As suggested above, collaborations may be considered as a strategic tool, helping to commit in a certain business model, by clarifying and testing beforehand, how value is delivered and what cause-and-effect relationships it builds. As this study aims to understand, how marketing incentives are created and, subsequently, delivered to both collaborating parties within sustainable fashion, the following table has subdivided the process in three steps, each associated to a specific tool, activity or benefit.

The value capture process, in sustainable fashion, is perceived to be started by CE and a GSCM application. This value capture is, then, processed into value creation, where both brands attribute each other brand characteristics and develop a product reflecting attributes such as commitment, transparency and innovation. The last step consists in delivering the created value to both the partner and final consumer and creates incentives, in terms of quality and self-esteem for the consumer and customer satisfaction and retention as well as enhanced production procedures for the brands, for both to commit a greener behaviour. Accordingly, these incentives mainly target collaborating brands, non-green oriented brands, potential future partners as well as consumers, fostering them to further invest in sustainable fashion.

To each of the steps, were associated the above-mentioned strategies applied by both ASOS and Orange Fiber. Consequently, this study suggests the following conclusions:

	Value capture	Value creation	Value delivery
TOOL	**GSCM**	**Co-creation**	**Incentive**
ASOS	▪ **S1**: Reverse logistics ▪ **S2**: Shared R&D ▪ **S3**: Brand life cycle ▪ **S4**: CRM	▪ **S1**: ASOS Marketplace ▪ **S2**:Sustainability workshops ▪ **S3**: Exclusive to ASOS collections ▪ **S4**: Education and facilitated access to sustainable production through social media platforms	▪ **S1**: Visibility for new and vintage fashion ▪ **S2**: Awareness and competition fostering ▪ **S3**: Shared market testing and penetration ▪ **S4**: Corporate identity building
ORANGE FIBER	▪ **S1**: Resource management ▪ **S2**: Power symmetry ▪ **S3**: Alternative resources ▪ **S4**: Power symmetry	▪ **S1**: Specific and adapted product development ▪ **S2**: Ferragamo capsule collection ▪ **S3**: Branding of ingredient for educational purposes ▪ **S4**: Distinctive identity building	▪ **S1**: Differentiation and diversification as a service offering ▪ **S2**: Corporate identity building ▪ **S3**: Corporate identity building ▪ **S4**: Internationalisation and market penetration

TABLE 3: Marketing strategy process – self-elaborated

As the above Table 3 illustrates, ASOS has implemented various GSCM tools. From reverse logistics to CRM, the GSCM tools have allowed third-party brands to collaborate with ASOS and establish different activities, as well as products contributing to a greener online platform. All these activities and products have, subsequently, delivered benefits for both parties such as increased visibility, market penetration and competitive advantage. Equally, the principal benefits engendered by the Ferragamo Orange Fiber collaboration, are internationalisation opportunities, differentiation from competition as well as short-term market penetration. In a B2B context, green oriented brands such as Orange Fiber and ASOS, promote GSCM as a tool fostering key market-related opportunities. Some of these are, for instance, internationalisation, competitive advantage through product differentiation and testing a brand on a new, highly competitive market. Companies with a green oriented SC aim to communicate to partners how a durable GSCM application, may extend these short-term benefits perceived during the collaboration into long-term advantages. As stated in the above Literature Review chapter, creating value through a GSCM application joins consumers, brands and the environment in a 'win-win-win' situation.

Table 3 shows how, ultimately, the main, common benefit and incentive for partners, is the corporate identity building. As briefly explained in the Literature Review chapter, brands involved in a co-branding strategy, engage in a symbolic and interactionist approach (Ashforth, 2000). This approach aims to build an identity around existing societal concerns by merging key characteristics of both parties. Partners of Orange Fiber and ASOS adopt and include in their product portfolio, an image of a committed, innovation driven and transparent brand. If such collaborations happen repeatedly, especially on online retailer's platforms where a wide variety of brands are gathered, a system of interconnected brand is established providing consumers with a corporate image build on attributes such as trust, transparency and clarity.

All in all, this study concludes that marketing adopts an educational as well as promotional role in B2B and B2C relationships. From an educational perspective, by making partners collaborate for a short period of time in a GSCM, the incentivising brands, aim to motivate partners towards a greener production by allowing them to test the sustainability market and a GSCM for a short period of time. From a promotional perspective, the benefits of a green co-branding, challenges and motivates competing brands, to adopt a mimetic strategy, creating a green chain reaction in the fashion industry. Accordingly, in a B2C relationship, the promotion of a green product aims to, first of all, educate consumers about their consumption habits and, ultimately, to create demand.

The underneath illustration demonstrates how the chain effect is engaged both in B2B and B2C relationships. The triangle represents the different stages of marketing incentive creation and the circle represents the chain effect caused. Value is captured through a GSCM and is used in B2B relationships to create and deliver attractive value propositions for both the market and the consumer. This value delivery triggers demand for sustainable productions from both the consumers and the businesses.

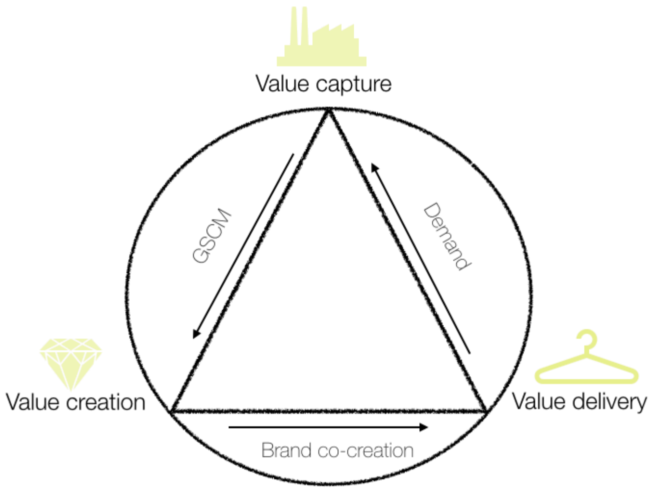

FIGURE 9: Marketing incentive transition – self-elaborated

In order to valid and extend the answer to the second research question and address the third research objective, we will conclude the discussion with a positioning map as well as a focus group discussion.

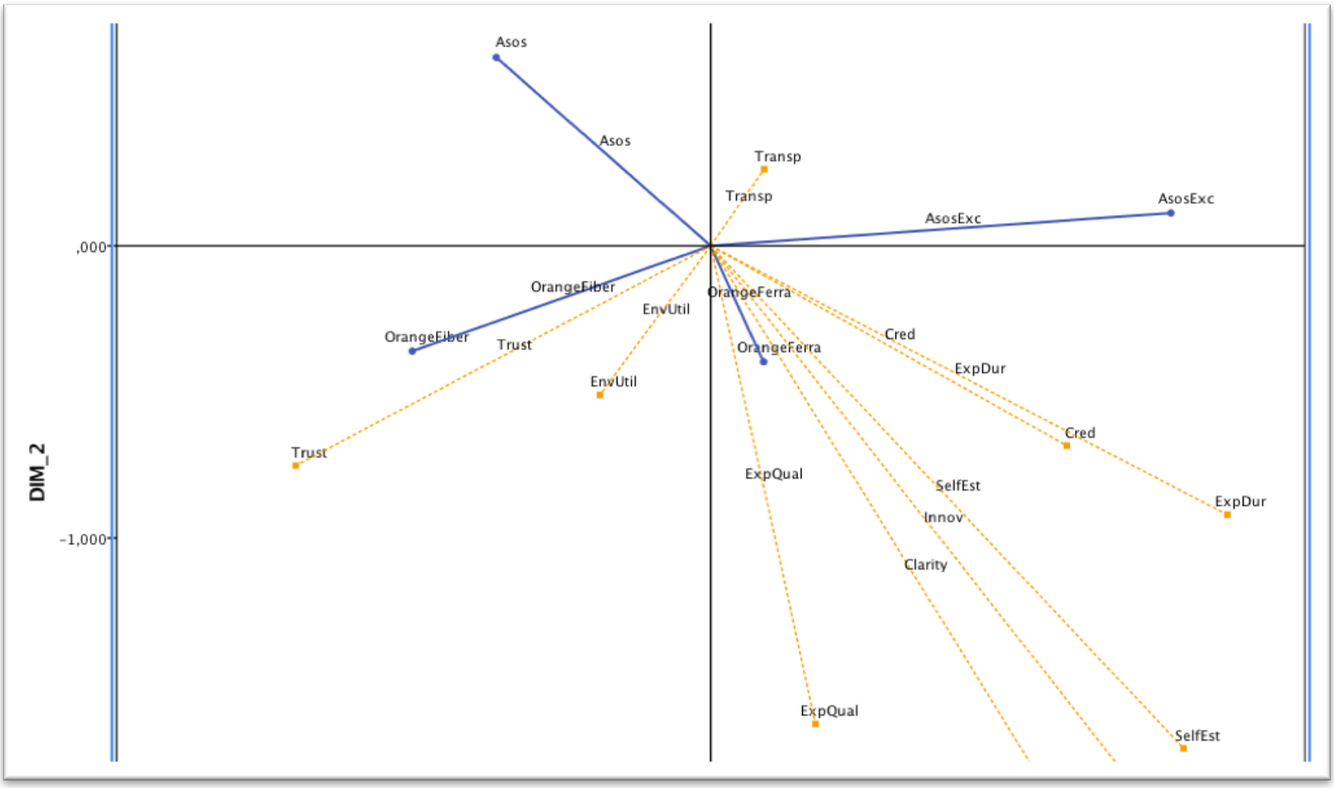

FIGURE 10: Perceptual map (zoomed in version, complete version in appendix V)

The figure 10 illustrates the focus group's perception of the compared brands as well as their partners. The interpretation of the positing map suggests the following results:

1) The focus group perceives the ASOS Exclusive collections, as well as the Ferragamo Orange Fiber collection, as credible co-brandings, from which they would expect a longer durability. The group argued that the price tag as well as the raw materials used for both collections, justify the expectation of more durable clothing items. However, the expected durability, credibility, self-esteem, innovation as well as clarity, are attributes, the group associated more with the Ferragamo Orange Fiber Collection. This tendency to attribute self-esteem, innovation and clarity more to the latter collaboration, is justified by the supplier's unique production procedure, which the respondents perceived as easy to understand. The rarity of such clothing items as well as the education

about specific environmental issues given by the concept of Orange Fiber, emphasize the self-esteem of consumers. The respondents tend to attribute values, such as trust and environmental utility, more to Orange Fiber itself, rather than to the collaboration with Ferragamo. As with ASOS and ASOS exclusive collections, respondents are more reticent towards companies having established a well-known brand, without following a sustainable business model.

2) Moreover, it is interesting to note how transparency, a key component of contemporary identity building for brands, as discussed in the Literature Review chapter, is more associated to ASOS exclusivity collections. ASOS' detailed reports and sustainability policies available on the website underlines the group's willingness to durably commit to a SD in their SC. The group argued, further, that the commitment of ASOS in including organic cotton in their exclusivity deals whilst maintaining decent working conditions, lead them to associate transparency more with the online retailer. Additionally, with little or no information about the ethical procedure and commitment of the Ferragamo Orange Fiber collection, a part of the group argued that the association of transparency with this collaboration is less spontaneous.

In addition to the perceptual map, it is interesting to note further observations of the focus group. As the discussion increasingly pointed out the importance of educating consumers about the raw materials used, the group established two opinions. One part of the group stated that sustainability starts with the raw materials, whilst the counterpart of the group argued that sustainability starts with those companies having the means and partners to invest and change the current situation of the industry. Some respondents stated that sustainability must be fostered by innovative business models such as Orange Fiber's and that a GSCM must start with the right raw material. These respondents argued, further, that they perceived the cotton market as a vicious circle, unable to keep up with the demand side of the SC such that, they believe that organic cotton will, eventually, end up in the same position as the regular cotton finds itself nowadays. For the counterpart, companies such as ASOS, gathering influential brands in one group, must start the movement with extensive investments in R&D such that a repetition of the cotton history does not happen.

Even though the group had distinctive opinions about the key actors and activities for a greener fashion industry, they all agreed on questioning how efficient, such models as Orange Fiber's zero-waste production model, based on the reprocessing of waste, would be, if applied to the fast fashion movement. The group argued that only if the demand side does become leader of the green movement, will businesses be urged to durably commit to green business models. Respondents understood sustainable productions, rather, as an opportunity to foster artisanship in the luxury industry, especially through collaborations with companies offering such distinctive production models. Although they agreed on the necessity for fast fashion to adopt luxury's and slow fashion's commitment to lower volumes and less collections, they doubt the possibility to match zero waste production models with the current fast fashion industry and consumption dynamic.

All in all, the conducted focus group confirms how collaborations between two brands generate positive brand associations. Both brands' collaborations attracted the respondents' curiosity more than their individual green commitment. The perceived high transparency of ASOS's commitment suggest how collaborations, particularly in fast fashion, are essential to communicate to sceptical consumers a willingness to foster a slow transition towards circularity. Equally, the conception of the luxury industry as a movement focused on artisanship, underlines the opportunity for this industry to further collaborations with distinctive, sustainable production models. The reticent attitude towards well-known brands based on a linear SC, suggests the opportunity and need for them to increasingly promote their green production procedure, through concrete education of consumers about the raw material and ethical policies used.

Chapter VI
Conclusion

6.1. Summary and contribution of the study

Conclusively, this study has addressed the research gap in B2B marketing by, identifying collaborations between brands as the key marketing incentive for non-green oriented brands, to dare a first step into the sustainability market. The comparative case study listed various strategies, established by Orange Fiber and ASOS, suggesting how both companies have established strong market positions in sustainable fashion. Whereas Orange Fiber developed a unique and difficult to imitate production model, ASOS has become one of the leading brands in engaging in sustainability as a fast fashion online platform, because of its large sustainable product offering and association to global green organizations such as the GFA. Thus, this study has established a replication logic, as announced in the methodology chapter, by analysing how both brands, from different fashion movements, have applied the same marketing strategy process build on essential concepts mentioned during the Literature Review chapter. The study contributed not only by analysing how the literature review concepts are applied in both fashion streams, but also by finding that both streams operate in the same way to attract business partners.

In fact, both brands followed the same strategy construction process. Both have applied a GSCM, in order to capture attractive value for both non-green oriented brands and their final consumers. This value capture through a GSCM application, occurred by integrating alternative resources into the SC and contributing to a power symmetry between suppliers and brands. The successive value co-creation process aimed to build a strong market entry strategy by reflecting both parties' most valuable traits in the product characteristics and co-branding image. The constructed, co-created value is, lastly, transmitted to the final consumers to trigger curiosity and increasing demand, from businesses and consumers, in regular markets for eco-fashion. The value delivery process to consumers also aims to foster competition between green oriented brands and brands exclusively operating though a linear SC.

As the literature review chapter already suggested, collaborations as well as co-branding strategies are effective and risk lowering tools for market penetration and brand image building. Green oriented brands promote collaborations as a key tool for generating market-related advantages such as new markets testing and competitive advantage creation. Equally, collaborations construct a corporate identity built around attributes such as transparency, commitment and differentiation in order to foster consumer curiosity and, consequently, consumer demand for greener clothing items.

All in all, this study concludes that, the promotional role of marketing is extended and complemented with an educational role. Education is driven by the competitive spirit of brands, which wish to constantly be up to date concerning competitors' next steps and investments, and, consequently drives them to look into sustainable fashion when main competitor release sustainable clothing collections. Similarly, as sustainable fashion is slowly increasing its visibility in the competitive fashion market, brands establish a closer relationship with consumers, by turning their once exclusively promotional, marketing content into an educational, informative and two-way communication.

6.2. Managerial implications

As a consequence, this study suggests to green-oriented brands to further drive large-scale, cross value-chain projects with regular, linear business, to introduce forward thinking and accessible opportunities in the eco-fashion market. The proposition should emphasise how CE models protect and deliver greater value to end consumers and the brand's own business, as such models identify and eliminate inefficiency in asset utilization and waste streams. Especially online retailers offering their own-labelled clothing items as well as third-party brands, should commit, as ASOS, on including sustainable, start-ups in their product offerings as well as on sustainably producing a large part of their own collection. Their own, sustainable collection should be largely promoted on the main, highly trafficked pages of the website, such that regular clothing brands feel the urge to accompany the movement on the platform. Additionally, the platform should promote the sustainably produced own-label with concrete examples in form of case studies or short videos, of how the usage of organic cotton, for instance, has ethically and environmentally contributed to the SD.

Online retailers committed to SD could integrate, on micro-sites such as ASOS Marketplace, the opportunity for environmentally conscious consumers to help fundraise sustainable start-ups such as Orange Fiber. Considering the daily, dense traffic on ASOS Marketplace, such fundraising action could substantially help start-ups to grow. Eventually, these start-ups may, later on, integrate the platform as a long-term brand with a complete collection. This action would not only foster the image of the platform as a forward-think and innovation-driven business, but would also give credibility to the platforms' commitment to SD.

6.3. Limitations and future research

One of the limitations of this study, is the absence of the perspectives of both collaborators, Puma and Ferragamo. This gap is justified by the reticence of brands and their unwillingness to share more information about sustainability within their business, experienced by the researcher. Thus, a future research could further analyse green collaborations by including both perspectives and perhaps identify other marketing incentives, with a larger number of companies and co-branding strategies.

Equally, the sample of consumers in this study is not significant enough to draw general conclusions, such that future research might consider analysing consumers' perception of green collaborations with a large and significant sample. A larger sample would be able to give more insights about the value consumers attribute to marketing strategy focusing on educational and informative content.

Moreover, a reconceptualization of green labelling could be undertaken in the scope of a scientific research. The focus group revealed how, information exposed on websites and social media accounts, may be more influential and informative than the symbols and information featured on current labels. Consequently, future research may question if and how far consumers are educated about sustainability topics through current green labels and perhaps propose how these may be improved.

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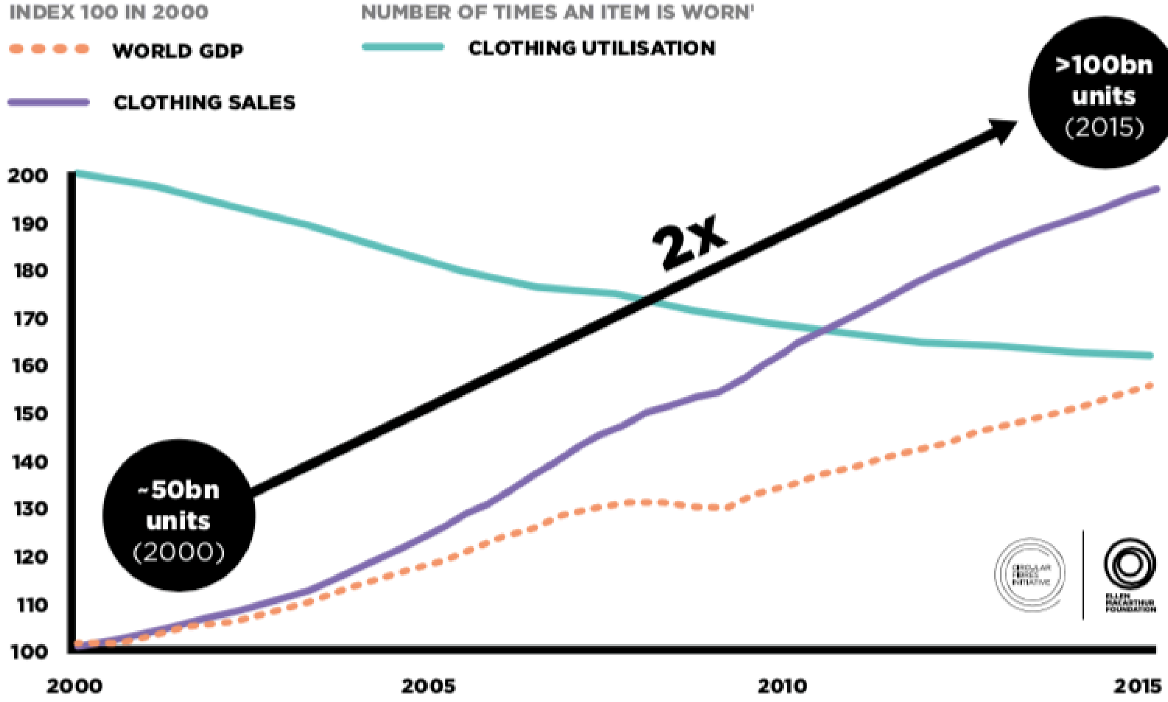
Annexes

Annex I. Clothing sales growth and clothing utilisation decline since 2000 until 2015 (EMAF Report 2015)



Annex II. Original Yin (2009) case study method

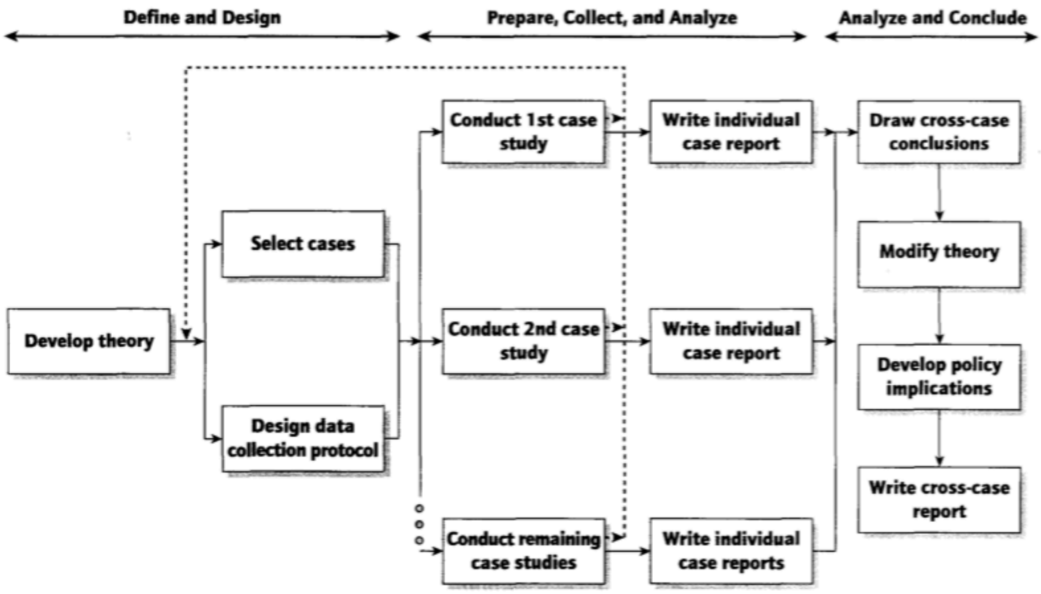


Figure 2.5 Case Study Method

Annex III. ASOS Marketplace promotion tools and advice

PROMOTE YOUR BOUTIQUE

WHAT IS PROMOTING A BOUTIQUE?

Promoting your Boutique gives the option to pay to feature on some high traffic pages of ASOS Marketplace; The Hub pages, and the Men's and Women's homepages. It is a highly effective way to give your boutique visibility on these popular pages. Promote your boutique here.

Return to top

CAN I AMEND OR CANCEL PROMOTING MY BOUTIQUE ONCE I HAVE BOOKED A SLOT?

Once you confirm your promotion you are unable to change or cancel it. Promote your boutique here

Return to top

HOW DO I PAY TO PROMOTE MY BOUTIQUE?

The cost of the promotion will be added to your monthly invoice. Promote your boutique here.

Return to top

HOW LONG DOES PROMOTING MY BOUTIQUE LAST?

Each spot gets you 24hrs in the rotating item list at the top the page that you have chosen to promote on. Promotions start at midnight UTC (formerly GMT) and end 11:59 UTC (GMT). Promote your boutique here

Return to top

HOW MUCH DOES PROMOTING MY BOUTIQUE COST?

Prices detailed below; Promote your boutique here

LOCATION OF PROMOTION	DURATION	COST
Homepage - Women	24hrs	£6
Homepage - Men	24hrs	£6
Boutique Directory	24hrs	£4

HELP! I'VE RECEIVED NEGATIVE FEEDBACK. WHAT'S THE BEST THING I CAN DO?!

Receiving negative feedback is part of retailing, so if it happens keep calm and take a step back to review the order.

Always try to resolve the issues directly with the customer and really assess why the negative feedback was left and learn from it so that your future customers have the best possible shopping experience with your Boutique.

We recommend always responding to the customer in as helpful manner as possible. If there's a delivery issue, why not reconfirm the customer's tracking information, or check it yourself for any issues? Are they not happy with the item? Let them know how to return it for a refund. Imagine yourself as the customer and always be polite and helpful in replies.

I'VE RECEIVED NEGATIVE FEEDBACK. WHAT SHOULD I AVOID?!

Put yourself in the customers shoes and remember that you are running a business, we advise that you do not be defensive, write an essay or blame an unrelated factor, instead reply to the customer being super helpful as ultimately the customer just wants the item they ordered, once any issues are ironed out customers are usually more than happy to reconsider their feedback.

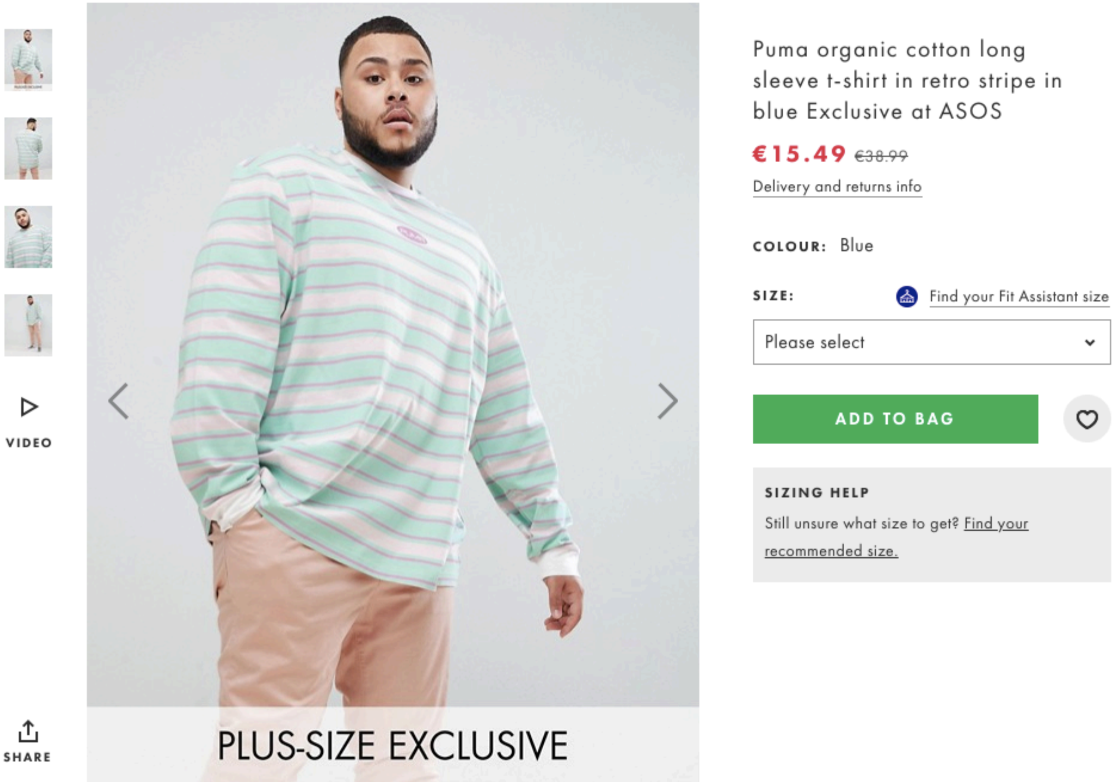
WHAT IS STRIPE?

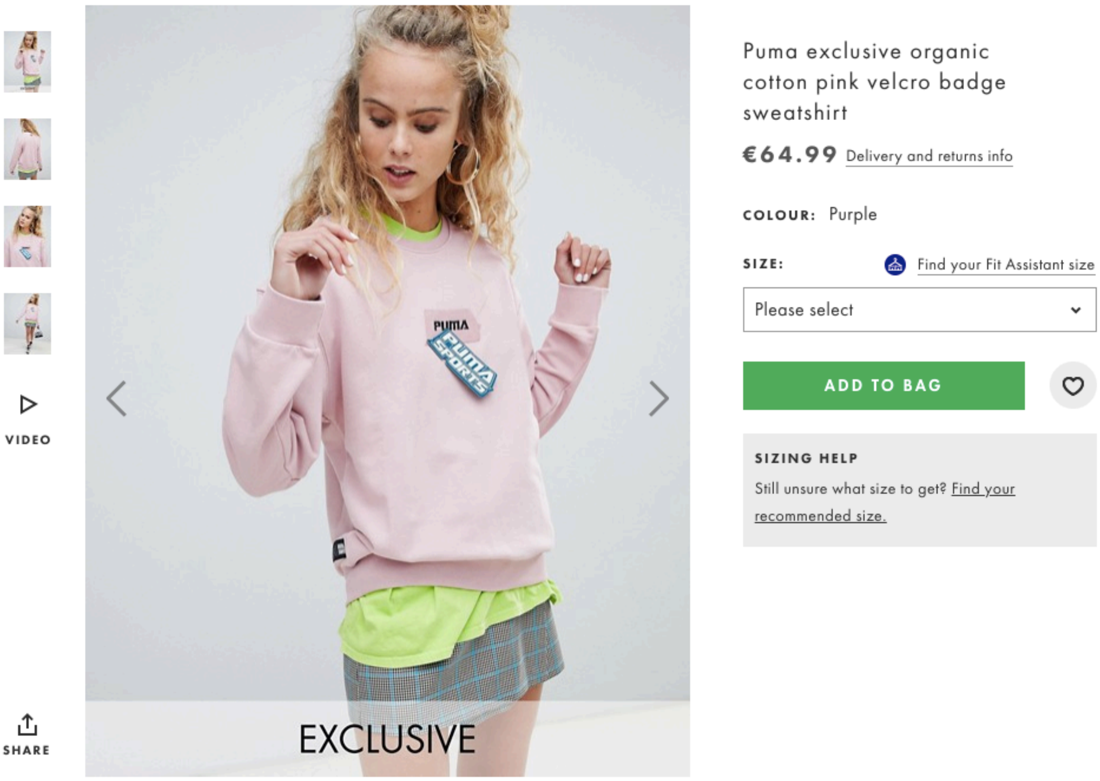
Stripe is a new way to accept payments online and from mobile devices. It allows ASOS Marketplace customers who pay by credit or debit card to pay you directly though Stripe via a Marketplace-branded checkout.

WHY DO I NEED STRIPE?

- **It's better for customers:** Our new checkout will make it much quicker, simpler and easier for customers to checkout, especially on mobile. There are fewer steps involved, they won't need to set up a new account and can pay directly using all major credit and debit cards. We'll continue to offer PayPal so customers will have tons of choice, too.
- **It's better for boutiques:** By simplifying the checkout process, we are confident that conversion will increase and you'll see more sales coming through. Even better, the processing fees you are charged will be lower in almost all cases. Finally, you will get much better visibility of and protection from fraudulent transactions.
- **It's a great partner for the future:** Stripe is the most innovative payment provider in the market, powering the checkout for huge digital businesses like Shopify, Pinterest, Lyft and Kickstarter. They are constantly releasing new features, integrations and payment methods, and they work closely with social networks to make it easier for customers to buy what they want, when they want and where they want.

Annex IV. Puma Exclusive to ASOS collection



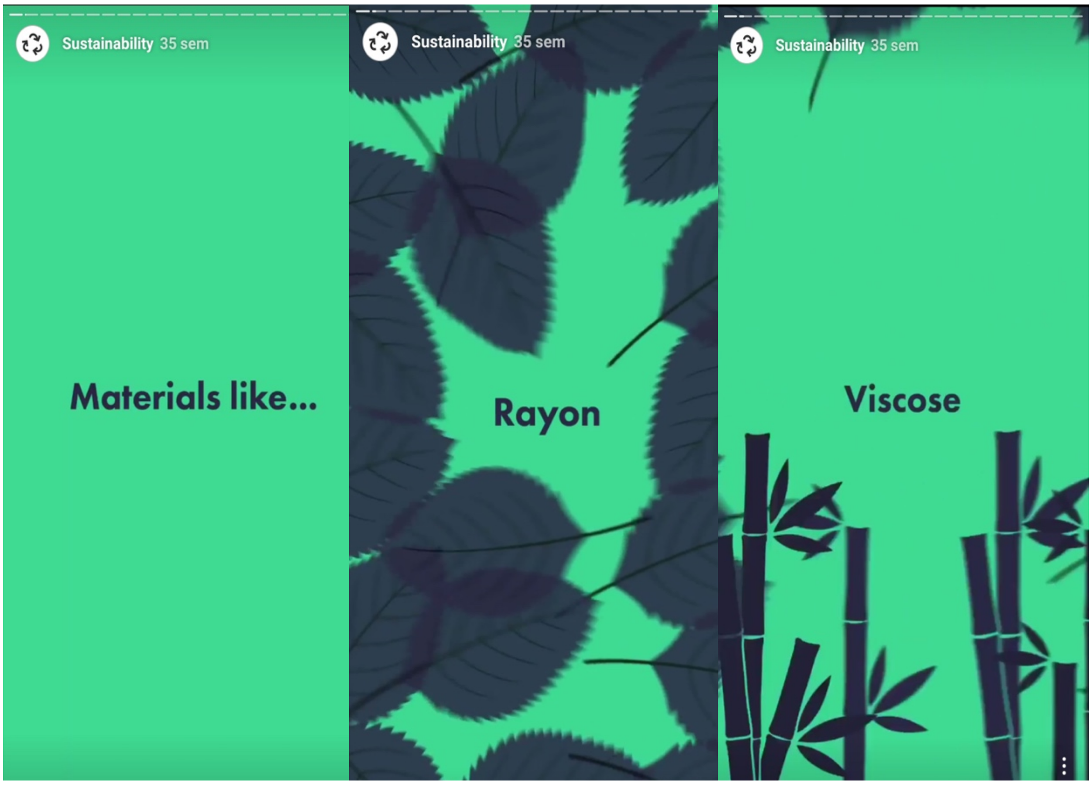


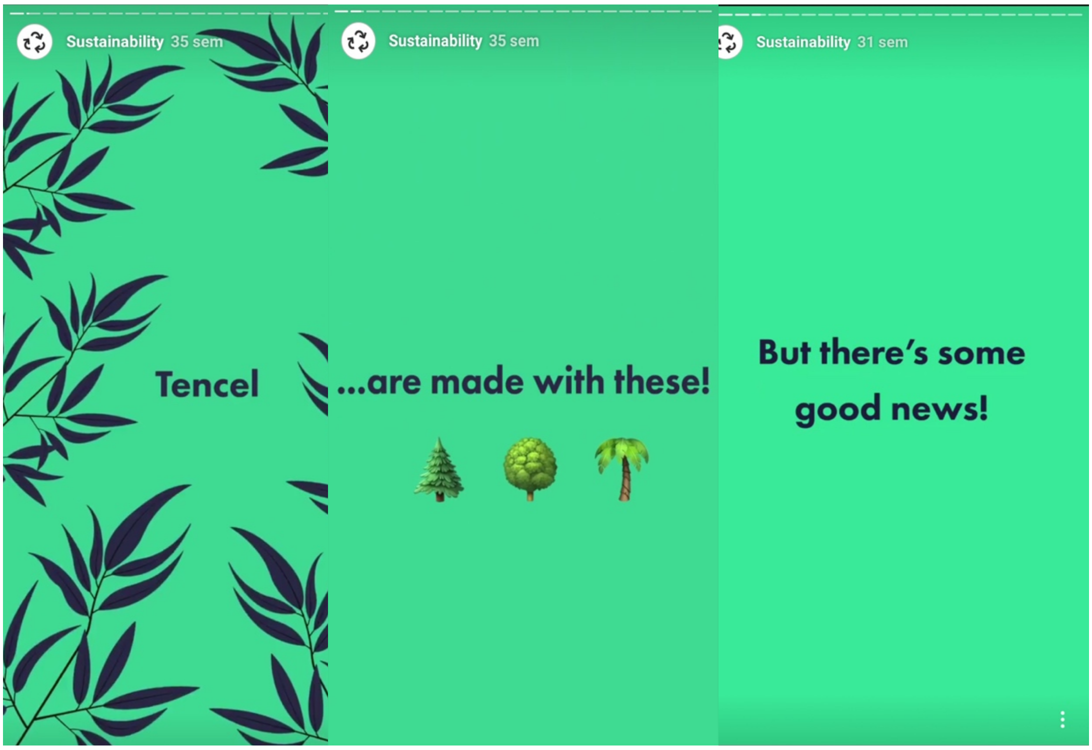
Annex V.1. ASOS social media posts

Annex V.2. Instagram 'stories'


Sustainability 15 sem
AND
they come in
super-cute styles


Sustainability 35 sem
Some of the trees
found in clothes
are hundreds,
even thousands
of years old
and are vital to the
survival of the species
around them...


Sustainability 35 sem
Materials like...
Sustainability 35 sem
Rayon
Sustainability 35 sem
Viscose


Sustainability 35 sem
Tencel
Sustainability 35 sem
...are made with these!
Sustainability 31 sem
But there's some good news!


Sustainability 31 sem
We're working with
@CANOPYPLANET


Sustainability 31 sem
to eliminate clothing made with these ancient trees
and only use sustainable, renewable materials


Sustainability 27 sem
The cotton we are switching to is either


Sustainability 27 sem
recycled


Sustainability 27 sem
organic


Sustainability 27 sem
or ensures
farmers are treated
and paid fairly


Sustainability 33 sem
Did you know...
- We throw away 2.5 billion coffee cups every year in the UK alone
- Only 1% of those actually get recycled


Sustainability 3 sem
Keep it neon
Spot clean with a toothbrush
Don't wash with darker colours
Wash on cold


asos 4 min
The laser process we use for ASOS DESIGN recycled jeans uses light instead of harmful chemicals and significantly reduces water consumption

Appendixes

Appendix I. Interview guide: ASOS

1. Understand why sustainability has been an integrated part of their business model.
2. Has there been a noticeable increase in the purchase and search of sustainable fashion items on the platform.
3. How and if they consider themselves as having a crucial position in the promotion and normalization of sustainable fashion.
4. If so, which brands stand out and which have becoming leading brands in offering a wide range of sustainable options.
5. Understand how the process of sustainable, exclusive to ASOS collections works.
6. Does the platform aim to have clear barriers between regular third-party and own-labelled brands and sustainable brands.
7. What are the main motivation(s) to integrate such collaborations in terms of marketing benefits as well as sustainable product offering.
8. Find out how these collaborations should change/challenge/support ASOS' positioning in the sustainability market.
9. Discern how sustainable products are promoted on the platform and outside the platform and how these marketing activities may attract future partners.
10. Understand how the company intends to continue integrating sustainable product offering and if collaborations with third-party brands are the main strategic tool for this expansion.

Appendix I.1. Interview transcription

The beginning of the interview covered the first three points purposed in the interview guide above concerning sustainable fashion consumption on the ASOS platform. When asked about whether or not there is a noticeable increase in the purchase and search of sustainable fashion items on the ASOS platform, the interviewee argued that it would be hard to state that there is indeed a considerable and durable rise in demand for sustainable products. There is a fluctuation during the lifetime of a sustainable product on the site. When a product is firstly launched, especially when new, highly searched and purchased clothing items such as jeans or basic tops are introduced into the website, there is a noticeable peek in the search for sustainable products. This peek, however, may not be a steady and durable peek and the search for such products may lower once the new product leaves the 'new in' category of the website.

Currently, there is no data showing purchases versus availability of product, linking a rise in purchase to a specific, sustainable product. However, the interviewee pointed out that the current push is to get rid of the 'Eco Edit' category of the website, dedicated to sustainable products. The aim is to make shopping sustainable an integrated part of the site in order to make the user experience clearer. In order to proceed with the integration of the 'Eco Edit' into the regular clothing categories of the site, the interviewee argues that there is an urgent need for them to educate their consumers on why and what makes a product sustainable. This education is predominately done through their social media platforms and aims to increasingly rise the demand for such, green products. Once this rise in demand is clearly and inevitably noticeable, the separation of sustainable products into a separate category, as it currently is, will no longer be necessary and the availability of such products will increasingly rise.

The integration of such sustainable products into the regular, clothing items sections, also aims to eliminate the cliché that sustainability compromises trends and fashionability. In a first instance, the current aim is to provide consumers the idea that, sustainable options are making their appearance in the fast fashion industry and may not only be considered as, an expensive and luxury clothing item. Once consumers are fully aware of the availability of sustainable products in fast fashion platforms, the focus of the company is to make the purchase of such products as a purchase behaviour naturally occurring because of the fashionability of the items as well as their accessibility in terms of price. In this perspective, the company has been structured such that, the sustainable sourcing team works closely with the product buying team as well as the fiber switching team. Whilst the product buying team notices a considerable increase in green product buying, the sustainable sourcing team works closely with the fibers team, assuring that this shift in purchase behaviour, is answered with an increased investment in sustainable textiles. Ultimately, the teams focus, currently, on bringing as much as possible sustainable products on the site as well as on controlling working conditions and raw material selection of their supply chain. As a consequence, the interviewee concluded that the sustainable buying budget has been invested in mapping of supply chains and the production of sustainable products, being the leading objectives of the online retailer. The data gathering linking purchase behaviour and product availability, remains a task they intend to tackle in the near future. The yearly, huge financial increase in logistical investment suggests that, an investment in technological tools to trace consumer purchase behaviour data related to sustainability, will happen in a near future.

The conversion, then, carried on covering the topics mentioned in points four to eight of the interview guide, more especially how the 'Exclusive to ASOS' using sustainable raw material are established. The interviewee explained that the initiative may be taken by either a brand featuring on the website or ASOS itself. Brands such as Monki, offering fairly only sustainable products, has approached ASOS several times for such exclusivity deals. Both brands' ethical policies and positioning as environmentally concerned brands, make the planning and production of such collaborative collections easier and trustworthy for consumers. Whenever ASOS collaborates with green oriented brands, both parties profit from the already existing knowledge on GSCM and may, consequently, give more attention to the trendiness and fashionability of such products. Collaborations with non-green oriented brands demand a lot more attention and a fair greater financial investment from both parties, as the essential debuting stages of the supply chain, meaning the raw material selection and processing, need to be carefully assessed and mapped in order to plan and design exclusivity deals. Additionally, such collaborations, uniting two brands durably committed to a greener supply chain, the platform has allowed to enrich its workshops and internal, two-way influential dialogue with third-party brands with concrete examples of successful collections. Including green oriented brands such as Monki, Levi's, Cheap Monday or Adidas as main speakers during such workshops, should influence and educate not only ASOS but, most importantly, other brands included in their brand portfolio which do not meet the five minimum ethical requirements. The interview mentioned, as an example, the brand conference which took place the week preceding the interview and covered ethical trading and humanitarian issues in which the fashion industry is inevitably involved. This conference aimed to raise awareness, more specifically, on child labour issues. As a consequence, the conference gave retailers an overview over the different tools and actions to implement, for a beneficial and effective supply chain control and management.

These yearly conferences also aim to give advice to third-party brands on how to approach the sustainability market. The company focuses on making participants feel comfortable in asking and mentioning any type of questions, doubt or difficulty. A space of exchange of knowledge, questions and solutions is created such that a faster and more effective movement of ASOS as a whole towards sustainability is undertaken. The collaborations with well-known and proactive organizations, such as 'Textile Exchange', 'Global Fashion Agenda', 'United Nations Global Compact', 'Better Cotton Initiative' or 'Ellen MacArthur Foundation' amongst many other ethical and sustainable sourcing associations, ASOS engages in, are key partners to take on board for an eco-effective shift of their own and their brands' supply chains. Through such integrations in leading, ethical and sustainable sourcing organizations, ASOS provides its partners concrete answers to questions and difficulties, especially in what concerns certifications and raw material sourcing. The company believes that, such a constant exchange equips them and their brands with the tools and confidence needed, to make sustainable buying decisions. By providing brands with the adequate knowledge about sustainable sourcing, the interviewee explains that the buying process and integration of a product on the 'Eco Edit' or other categories of the website, becomes simpler and clearer. Indeed, when partners adopt clear ethical policies and sustainable material certifications, ASOS can easily categorise and label a product with the 'Eco Edit' label, such that it also becomes easier and clearer for the final consumer to recognize and distinguish product types for a specific brand.

To conclude, the interview briefly touched on the final two points of the above interview guide concerning the promotion of sustainable products and their future availability on the platform. Regarding the promotion of green products, the interviewee argued that social media platforms seem to be the most effective channels because it opens up a dialogue. Instagram, for instance, focuses on starting a dialogue about garment care and the extension of clothing life cycle, as well as sustainable materials and plastics. The interviewee argues that, they believe most of consumers face a lack in education about raw materials used in clothing production which, subsequently, must be addressed in order to foster an increase in purchase traffic on the 'Eco Edit' website category. In this perspective, the Instagram posts vary from, tips and tricks on how to improve the longevity of clothing items, to educating consumers on how raw materials such as plastic and fibers derived from ancient trees, impact human and environmental wellbeing. Another marketing objective, in the scope of sustainable clothing advertising, is to change user experience through search engine optimization.

Currently, the Sustainability Team is working on optimizing the labelling and description of green products such that, whenever consumers research key words linked to sustainability like 'organic cotton', every product including this raw material pops up. As of now, only those products labelled with the key words introduced by consumers, appear in the results. The goal is to optimize the research engine and, inevitably, third-party brands' transparency on the raw materials used, such that, in a near future, key words linked to sustainability must not feature in the title of a given product to appear as a result.

Another marketing technique the interviewee briefly mentioned is, the integration of 'ASOS Insiders' promoting and showcasing sustainable clothing items. She went on by explaining how 'ASOS Insiders' have become a valuable and indispensable marketing tool for the platform. Giving their success on social media platforms, the company is now searching for young, committed and proactive so called ‘influencers’ to promote majorly sustainable clothing on their social profiles. In the scope of this project, the company has been organizing workshops for its Insiders in order to start a dialogue, similarly as with their third-party brands, on topics such as the current consumption behaviour and the subsequent necessity to make consumers become more familiar with sustainable fashion. As representatives of the ASOS brand, it is crucial that the commitment of the company in transitioning the fast fashion industry to a greener one, is communicated on all their communication channels.

Appendix II. Interview guide: Orange Fiber

1. Understand how the company perceives itself in its collaborations: as a supplier or a brand.
2. How they promote their material to attract potential, future partners.
3. Understand why their focus on the luxury market and if the fast fashion industry would be a potential objective in the future.

Questionnaire

1. In your opinion, are more businesses or consumers currently a major barrier challenging a definite implantation of sustainability in the fashion industry? Why?
2. In your opinion, should marketing actors promote innovative but sustainable business models as something exceptional or as the new, necessary standard?
3. Do you consider your supply chain to work in a closed loop supply chain or rather the initiative and first step for your partners to create a green and closed supply chain?
4. Would you consider yourself as a material and marketing tool supplier for your partners?
5. How many and with whom did you collaborate besides Ferragamo? Do you intend to focus on the luxury fashion?

Appendix II.1. Interview transcription

1) Secondo voi, chi opera nel marketing dovrebbe promuovere business innovativi e sostenibili come un'eccezione o come un nuovo e necessario standard?

Oggi più che mai, il marketing e la comunicazione giocano un ruolo fondamentale a livello economico e sociale grazie all'enorme cassa di risonanza rappresentata dai social network. Per questo motivo siamo convinte che possano essere cruciali nel veicolare nuovi ed importanti temi - come quello della sostenibilità - contribuendo attivamente a far conoscere progetti, startup e aziende innovative che lavorano ogni giorno per preservare l'ambiente e le persone. La svolta nel comportamento dei consumatori crea un gap e delle opportunità per le aziende che offrono soluzioni sostenibili.

Chi opera nel settore del marketing dovrebbe conoscere l'importanza dell'adozione di uno stile di vita e di modelli di produzione e consumo sostenibili, fare propri questi valori e renderli parte fondamentale di un progetto a lungo termine capace di guardare e salvaguardare il futuro del nostro Pianeta.

In your opinion, those who operate in marketing should promote innovative and sustainable businesses as exceptions, or as new and necessary standards?

Today more than ever, marketing and communication play a primary role at the economic and social level, thanks to the enormous reach allowed by social media. This is the reason why we are convinced that social media can be crucial in the transmission of new and important topics, like sustainability, actively contributing to the awareness and exposure of projects, start-ups and innovative companies, that work daily to preserve the environment and the people. The change in the consumers' consumption habits creates gaps as well as opportunities for companies that offer sustainable solutions.

Those operating in the marketing area should be aware of the importance of the adoption of a sustainable lifestyle and sustainable production models, absorb these values and make them the basis of a long-term project, aiming the future and the preservation of our planet.

2) Considerate la vostra catena di approvvigionamento un cerchio chiuso oppure la vedete come un'iniziativa per il primo passo dei vostri partner verso una catena di approvvigionamento green circolare?

Solo in Italia sono oltre 700.000 le tonnellate di sottoprodotto derivanti ogni anno dall'industria di trasformazione agrumicola, un rifiuto ingombrante che rappresenta un grosso problema per l'intera filiera agrumicola a causa dei suoi elevati costi di smaltimento e del suo impatto ambientale.

In seguito alla collaborazione con il laboratorio di Chimica dei Materiali del Politecnico di Milano, nel 2012 siamo riuscite a sviluppare e brevettare un innovativo processo che ci consente di recuperare questo sottoprodotto e utilizzarlo per creare un tessuto sostenibile di altissima qualità per il comparto moda-lusso. Tutt'ora ci concentriamo sui processi di ricerca e sviluppo mirando l'ottimizzazione dei costi di produzione perfezionando la tecnologia da replicare all'estero. Nel futuro prossimo, continueremo a focalizzarci sul testare, migliorare e perfezionare la nostra business idea, basata sulle caratteristiche dell'economia circolare, consolidando la nostra presenza come fornitore di servizi nel segmento sostenibilità e innovazione tessile.

Nello specifico, il nostro tessuto viene realizzato a partire dal pastazzo d'agrumi, ossia quel residuo umido che resta al termine della produzione industriale di succo di agrumi e che non può più essere utilizzato ma solo gettato via. Grazie al processo da noi brevettato, siamo in grado di sfruttare le potenzialità del pastazzo per l'estrazione della cellulosa d'agrumi atta alla filatura, trasformando così uno scarto in una risorsa per il rilancio economico del comparto manifatturiero italiano.

Do you consider your supply chain circular, or rather as an and opportunity for your partners, to initiate a green supply chain management?

Only in Italy, over 700.000 tons of by-product derive from the citrus transformation industry, which represent a cumbersome waste management issue due the high costs of disposal and the negative environmental impact. Following the collaboration with the laboratory of chemistry of materials of the Politecnico in Milan in 2012, we managed to develop and register the patent for an innovative process which allows to recover the by-product and to use it to develop a sustainable and high-quality textile, for the luxury fashion industry. We are focusing on completing the research and development processes aiming to optimise the costs of production, scaling up the technology to replicate abroad. In the near future, we will focus on continuing to test, improve and upscale our business idea, based on the basic characteristics of CE, in order to consolidate our presence as a service offering business in the sustainable and innovative tissue market.

In particular, our textile is created from the 'pastazzo d'agrumi', which is the not usable residual humid waste, remaining after the industrial production of citrus juice. Thanks to process we patented, we are able to exploit the potential of the 'pastazzo' for the extraction of citrus cellulose suitable for textile spinning, transforming waste into a resource boosting the economic aspect of the Italian manufacturing.

3) Secondo definizione, la sostenibilità è composta da tre elementi chiave: la sostenibilità economica, ambientale e sociale. L'aspetto economico di Orange Fiber è comprensibile. Cercate anche di incrementare la sostenibilità di altre risorse ambientali (riduzione del bisogno di: acqua, elettricità, etc.) e del sociale (condizioni di lavoro favorevoli, etc.)?

La nostra soluzione, estrarre una materia prima da un sottoprodotto industriale non rivale all'alimentazione offre la possibilità di soddisfare la crescente richiesta di cellulosa per uso tessile - dovuta alla volatilità dei prezzi del cotone e del petrolio - preservando al contempo le risorse naturali, senza produrre scarti industriali.

Paragonato alle fiber cellulosiche artificiali esistenti, sia quelle derivate da legno che quelle da canapa e bambù, Orange Fiber non sfrutta le risorse naturali, ma riutilizza un sottoprodotto, riducendo così lo sfruttamento di terra e acqua e l'uso di pesticidi inquinanti.

Generalmente, creare tessuti da fonti alternative e sostenibili è più costoso, ma noi come produttori e fornitori di tessuti, siamo convinti che il servizio da noi offerto sarà più vantaggioso nei prossimi decenni a causa della volatilità dei prezzi del cotone e dei materiali ottenuti dalla lavorazione del petrolio.

Following the definition, sustainability is composed by three key elements: economic, environmental and social sustainability. The economic aspect of Orange Fiber is comprehensible. Do you also look to increase the sustainability of other environmental resources (reducing the need of: water, electricity, etc.) and other social aspects (favourable working conditions, etc.)?

Our solution, the extraction of a primary resource from an industrial by-product non rival to the food industry, offers the possibility to satisfy the growing demand of cellulose for textile production, due to the price volatility of cotton and oil, preserving, at the same time, the natural resources, without producing industrial waste.

Compared to the already existing artificial cellulosic fibers, like the ones extracted from wood, hemp and bamboo, Orange Fiber does not use natural resources, but re-uses a by-product, reducing the exploiting of earth and water, and reducing the use polluting pesticides.

In general, producing textiles from alternative and sustainable sources is more expensive, although as producer and supplier, we are convinced that over the next decades, our service will become more advantageous due to the price volatility of cotton and oil-based materials.

4) Con chi e quanti partner collaborate oltre Ferragamo? Avete intenzione di focalizzarvi sul luxury fashion?

Orange Fiber è il primo tessuto creato a partire dal sottoprodotto dell'industria di trasformazione agrumicola, un'innovazione di prodotto ma anche di processo, in quanto recuperiamo un materiale esausto, non rivale al consumo alimentare e lo trasformiamo - attraverso processi semi-industriali sostenibili - in un nuovo materiale di altissima qualità capace di rispondere alle esigenze di sostenibilità e innovazione dell'industria della moda.

Le varianti di tessuto finora prodotte comprendono un raso e un popeline - ottenuti tessendo il nostro esclusivo filato insieme alla seta comasca e al cotone - e un twill 100% Orange Fiber, impalpabile e leggero, simile alla viscosa, adeguato alle esigenze dei designer di moda. I nostri tessuti sono di colore bianco naturale ed è possibile poi tingerli, stamparli, colorarli e lavarli come i tradizionali tessuti sul mercato. La versatilità dei tessuti si adegua ai trend dei consumatori che abbinano design fast fashion con indumenti moda-lusso classici.

Grazie all'innovativo processo sviluppato, siamo in grado di produrre varie tipologie di tessuti, dai più strutturati ai più delicati, in modo da soddisfare tutte le esigenze di creazione dei brand di moda, come dimostra la *Ferragamo Orange Fiber Collection* composta da abiti, foulard, pantaloni, gonne e twin set, con distinguibili motivi in bianco e nero. Oltre a comunicare le caratteristiche dei nostri prodotti, diamo molta importanza al valore aggiunto dalla componente narrativa, ai valori etici al centro del nostro progetto, il processo di produzione e l'esperienza.

Il brand Salvatore Ferragamo è stato il primo a cogliere le potenzialità dei nostri tessuti. La collezione in collaborazione con la maison di moda fiorentina Salvatore Ferragamo ha rappresentato un importante traguardo per la nostra azienda: il primo grande passo nel mercato della moda internazionale.
Il successo di questa partnership, inoltre, ha contribuito notevolmente ad introdurre i nostri tessuti nel mondo della moda, sensibilizzando designer e brand verso l'uso di materiali sostenibili. La collaborazione ci ha aperto diverse

strade verso future collaborazioni capaci di conferire un nuovo posizionamento ai fornitori con annesso ruolo net mercato della moda.

Orange Fiber è un'azienda B2B che si rivolge principalmente ai Luxury Fashion Brand (con un posizionamento premium price), rispondendo alle nuove esigenze di innovazione e sostenibilità dell'industria della moda con un tessuto elegante e di qualità, capace di unire etica ed estetica e conservare intatte le risorse del pianeta per le generazioni future. Il target secondario è rappresentato dai clienti dei Luxury Fashion Brand, il che fa di Orange Fiber un'azienda B2B2C, sul modello dell'ingredient brand di Goretex.

How many partners do you work with, except Ferragamo? Do you have the intention to focus on the luxury fashion?

Orange Fiber is the first textile created from industrial citrus transformation by-product, which is an innovative product and process. At the same time, as we recover discarded material, it is not rival to food supplies and consumption. We transform these discarded materials through sustainable, semi-industrial processes, in a new high-quality material, able to satisfy the needs in terms of sustainability and innovation related to the fashion industry.

The types of textiles we produced until now include a kind of satin and poplin, obtained from the weaving of our exclusive yarn, including "comasco" silk (from Como, IT) and cotton. Furthermore, we produce a 100% Orange Fiber twill, soft and light like viscose, suitable according to the designers' needs.

Our textiles are initially white and can be dyed, printed, coloured and washed like the ordinary textiles available in the market. The versatility is in favour of the consumers' trend to match fast fashion designs with statement luxury pieces. Thanks to the innovative process we developed, we are able to produce different types of textiles, from the more textured, to the softest, allowing us to satisfy the creative and production needs of the fashion brands, as demonstrated by the Ferragamo Orange Fiber collection, which includes dresses, foulards, trousers, skirts and twin-sets, with distinguishable black and white illustrations.

We propose to only transmit the characteristics of our products, but most importantly, to transmit the added value offered in terms of storytelling, ethical values as the core of our project, the production processes and the experience.
Salvatore Ferragamo has been the first designer brand who has seized the potentials of our fabrics. The collection in collaboration with the Florentine fashion brand Salvatore Ferragamo, represented a major goal for our company: the first remarkable step in the international fashion market.

The success of this partnership has considerably contributed to introduce our textiles to the fashion industry and to sensitise designers and brands to use sustainable materials. It also opened the route for us into future collaborations capable of conferring suppliers a new positioning and role in the fashion market.

Orange Fiber is a B2B company which primarily targets luxury fashion brands (with a premium price positioning), responding to the needs of innovation and sustainability of the fashion industry, with an elegant and qualitative textile, able to unite ethics and aesthetics and to preserve the planet's resources for future generations. The secondary target are the consumers of luxury fashion brands, which positions Orange Fiber as a B2B2C company, similar to the ingredient brand model of Gore-Tex.

5) Secondo voi, imprese del segmento e consumatori sono o possono essere considerati come ostacoli per una definitiva implementazione dell'industria della moda sostenibile? Perché?

No, al contrario. Negli ultimi anni, il forte impatto dell'industria della moda sull'ambiente e sulle persone ha portato ad una presa di coscienza importante da parte degli operatori del settore e dei consumatori.
Oggi più che mai, si avverte la necessità di un cambiamento drastico dei modelli di produzione e consumo, esigenza che, forte delle più recenti innovazioni tecnologiche, si traduce in azione.

La nostra Orange Fiber è figlia di questa nuova sensibilità, è il nostro impegno per una moda più green ed eticamente corretta; è il sogno che con determinazione perseguiamo per far sì che si trasformi in una realtà capace di fare la differenza e contribuire ad un processo di sviluppo economico, sociale ed ambientale all'insegna della sostenibilità.

Il nostro obiettivo è fare di Orange Fiber l'azienda leader italiana nel segmento e nell'approviggionamento dei tessuti sostenibili attraverso una produzione "green" di tessili cellulosici da fonti rinnovabili e creare un marchio tessile altamente riconoscibile e differenziato dagli altri per l'impegno nella tutela dell'ambiente e la trasparenza dell'intera catena di produzione.

In your opinion, can the companies in the fashion industry and the consumers be considered as obstacles for a definitive implementation of a sustainable fashion industry? Why?

No, the opposite. In the last years, the strong impact of the fashion industry on the environment and on the people, brought to those who work in the industry and to the consumers, an important raise of awareness. Today more than ever, we notice the need of a drastic change in the production and consumption models. These needs have been inspired by the technological innovations and transformed into actions.

Orange Fiber was created from this new awareness and it is our engagement for a green and ethically correct fashion: it is the dream that we pursue with determination, in order to transform it into a reality able to make a difference and to contribute to the process of economic, social and environmental development, in the name of sustainability.

Our objective is Orange Fiber to become the Italian leader in sustainable textiles and their supply, through a green production of cellulosic textiles from renewable resources and to create a highly recognizable textile brand. The brand aims to clearly differentiate itself from the others, for the engagement in the environmental preservation and the transparency in the whole production chain.

Appendix III. Focus Group Interview guide

Introductory questions	• In your opinion, which sector(s) of our economy are leaders in polluting the ecosystem and should seriously consider climate change issues? • Is sustainability in clothing a topic you are aware of/you care about? • Do you know sustainable clothing brands? • What would you think distinguishes them from regular brands? • In your experience, are they clearly visible? • Do you believe in their commitment/contribution against climate change? or do you see it as a marketing strategy? • Do you research a brand's corporate responsibility reports? • Do you think that the perceived durability could suffer or benefit from sustainable materials?
Research related questions	• Do you value more the brand reputation, the origin of the raw material or the certifications? • Does credibility generate from differentiation or diversification? What is more credible? Or would a successful diversification strategy be more creditable? • Would you feel as part of a niche or evolving, potentially huge market buying these two brands? • Does the information on labels have an influence on the perceived quality? • In your opinion, should sustainability be fostered by the initial stages of the supply chain (supplier) or the ending, consumer touching stages (retailers)? • Are transparency (website information) and clarity (you feel informed and educated about sustainability issues) two distinct concepts? • Are social media platforms a provider of clarity or transparency? do you perceive it as the new advertising media or as the new media to inform consumers?
Ending questions	• Have your views about commitment to a greener supply chain in fast and slow/luxury fashion businesses changed?

Appendix III.1. Attribute-based perceptual map: Questionnaire for participants (attributes evaluation)

Please state how you perceive the following nine attributes in relation to the discussed brands:

1 denotes 'not accurate at all'

9 denotes 'fits completely'

1) Expected durability

	1	2	3	4	5	6	7	8	9
Orange Fiber									
ASOS									
Ferragamo Orange Fiber									
Puma Exclusive to ASOS									

2) Transparency

	1	2	3	4	5	6	7	8	9
Orange Fiber									
ASOS									
Ferragamo Orange Fiber									
Puma Exclusive to ASOS									

3) Credibility

	1	2	3	4	5	6	7	8	9
Orange Fiber									
ASOS									
Ferragamo Orange Fiber									
Puma Exclusive to ASOS									

4) Expected quality

	1	2	3	4	5	6	7	8	9
Orange Fiber									
ASOS									
Ferragamo Orange Fiber									
Puma Exclusive to ASOS									

5) Trustworthiness

	1	2	3	4	5	6	7	8	9
Orange Fiber									
ASOS									
Ferragamo Orange Fiber									
Puma Exclusive to ASOS									

6) Self-esteem

	1	2	3	4	5	6	7	8	9
Orange Fiber									
ASOS									
Ferragamo Orange Fiber									
Puma Exclusive to ASOS									

7) Innovation

	1	2	3	4	5	6	7	8	9
Orange Fiber									
ASOS									
Ferragamo Orange Fiber									
Puma Exclusive to ASOS									

8) Environmental utility

	1	2	3	4	5	6	7	8	9
Orange Fiber									
ASOS									
Ferragamo Orange Fiber									
Puma Exclusive to ASOS									

9) Clarity

	1	2	3	4	5	6	7	8	9
Orange Fiber									
ASOS									
Ferragamo Orange Fiber									
Puma Exclusive to ASOS									

Appendix III.2. Questionaire for participants (dissimilarities evaluation)

1 denotes 'not similar'

9 denotes 'completely similar'

Brands	1	2	3	4	5	6	7	8	9
ASOS vs Orange Fiber									
ASOS vs ASOS Exclusive									
ASOS vs OF Ferragamo									
Orange Fiber vs ASOS Exclusive									
Orange Fiber vs OF Ferragamo									
ASOS Exclusive vs OF Ferragamo									

Appendix III.3. Focus group transcription

The interview began by briefly introducing the concept of sustainability and presenting the brands featuring in the comparative case study. To introduce the respondents to the topic, the interviewer asked general questions related to sustainability, as indicated in the interview guide above. Firstly, the respondents defined the energy, automotive, chemical and glass industry to be leaders in polluting the ecosystem. When asked about if they were aware of the urge of adopting sustainable habits, all of the respondents agreed that they were conscious about the necessity but were avoiding the topic. Although some participants mentioned that they are becoming more aware of green labelling and marketing, they added that the lack of education from brands supports consumers' avoidance with the topic. In fact, some mentioned the necessity for brands to start educating their consumers if they want to avoid the cliché of consumers perceiving their green commitment as a mere promotional action. Furthermore, the respondents found it difficult to recall sustainable brands. Whereas some of the participants mentioned Adidas and Nike as an example for sustainable fashion, they knew that part of their marketing campaign consisted in promoting themselves as leading sustainable sports brands. However, they were not sure what makes these brands sustainable and what how to distinguish sustainable clothing items from Nike or Adidas from their regular product offering. Two respondents, more specifically two young mothers, mentioned specific brands using organic cotton such as 'Amor(a) Baby & Nature'. They argued that since becoming a mother, sustainability has become an important topic and factor in their daily habits, as they have increasingly become conscious about the impact of chemicals on human health, especially on children's health and growth process. Another part of the group mentioned online platforms such as Etsy. These platforms hosting small and independent shops offering a wide range of handmade products. Amongst these shops are small businesses offering hand-knitted clothing items such as cardigans. For some of the participants of the focus group, such shops offering handmade clothing pieces, are part of the sustainable fashion market. By coming up with this example, the group touched on an essential aspect of sustainability; what defines and makes a product sustainable. Therefore, the conversion continued by briefly touching on this crucial aspect, which, inevitably, came up again at various points of the conversation.

When asked about what distinguishes sustainable brands from regular ones, besides the raw material, the group agreed that the production procedure, meaning the usage of chemicals and child labour for instance, are important aspects distinguishing both fashion streams. Additionally, green labelling, more specifically labels with concrete information about workers' wages and conditions, are equally an important component of a sustainable product. Another participant added to this argument, the idea of communicating to consumers a feeling of belonging to a wave of new consumers such as the 'Fair Trade' labelling did in the food industry. She explained further that the food industry has slowly but surely integrated biological food offerings as a normal, integral part of grocery shops. Lastly, another participant mentioned the packaging of products, especially concerning online retailers, as an important aspect of a product. He argued that eliminating plastic and communicating to consumers the dangers of over-usage of plastics, would say a lot about whether or not a brand is truly committed.

When asked about whether or not the group believes in the commitment of brands in adopting greener activities, the group divided itself into two opinions. Whilst the one half of the group argued not being convinced that established brands such as ASOS could truly be commitment, but rather perceive it as pure marketing yet, the other half of the group argued that as long as businesses are supported with international certifications or organizations, they feel assured that the commitment is taken seriously and not as publicity. Even though one part of the group believes in green commitment to a certain extent, the group agreed on perceiving sustainability as a trend that is going to sell in the near future. As for now, the group agrees, further, that the price of company shares is of a bigger interest, in their opinion, then the willingness to contribute to a greener environment. One of the respondents argues that a durable and noticeable commitment of companies will take a long time. She advanced the example of McKinsey, a company she had worked for in Russia, which slowly adopted a corporate responsibility policy. This company started by substantially reducing business flights by replacing them with conference calls. After the company has adopted this small change in the company, she witnessed how numerous companies in Russia started to adopt the same change. With this example she wanted to illustrate how, sustainability is a topic approached by slow, little steps by companies such that she argues that it is only a matter of time for chain effect to be started. The group further agreed that commitment should be taken seriously from the demand side, in order to give businesses, the opportunity to build durable and eco-effective activities in their supply chain. As long as consumers do not take the topic seriously, as an urgent problem to be addressed for humanity to continue living on this planet, the commitment of businesses will always be doubted by the few minority of the consumers actively searching and purchasing sustainable clothing. If the shift happens and consumers become the leader of this commitment by actively demanding such products, then businesses will be urged to face sustainability as more than a trend but as a need and want of the current society and generation. The few businesses adopting green supply chain should, fuel those brands leading the industry with damaging production procedure. This influence may only happen if consumers start purchasing from such smaller brands and experience green activities as the new competitive, necessary advantage. About the last introductory question about the search for corporate sustainability reports, only the participants with children agreed that when purchasing for their children, they take the time to consult the reports to assure themselves that the clothes are certified with international, green labels.

The interview, then, pursued by interrogating participants about the perceived durability and quality of sustainable products. This question divided the group, as previously, in two separate opinions. For the most participants, sustainable materials such as organic cotton as well as the restricted use of chemicals and dying procedures suggest a better quality of the garments, in terms of impact on human health. Concerning the durability of clothing items, the majority of the participants remained rather sceptical. Only those participants already having purchased sustainable clothing, were convinced of the increased longevity of a sustainable clothing item. As these participants shared their experience with eco clothing items, the topic of garment washing and maintenance came up. Some argued that when purchasing organic cotton, the washing of such garments should be done with chemical free, natural detergents. Participants questioned whether or not sustainable fashion should be addressed as a process from purchasing to garment care, or rather from production to purchase behaviour. Some argued that purchasing organic cotton and washing it with regular detergent, would be contradictory.

Moreover, the next questions introduced both Orange Fiber and ASOS and introduced a marketing perspective on sustainable fashion. To begin, when asked about what was more valued by them when purchasing sustainable fashion, the group was divided between the raw material and the certifications. Whilst some argued that the certifications are a key concept in the purchase process of such garments, others argued, with the example of the food industry, that certifications could become more confusing than informative.

As a matter of fact, the respondents discussed how, in the food industry, plenty of eco-labels are found on products but only a fair few of them are understood and meaningful to consumers. Labels such as the 'Fair Trade' label have established concrete and understandable standards in consumers' minds, whereas others don't necessarily make consumers recall a particular set of values and production principals. These respondents, consequently, affirmed that the raw material used in the production is more valuable than the certifications. They argued that business models such as Orange Fiber's, which build a whole narrative and artisanship out of their production procedure and come across a fully transparent and committed brands. Whilst some found ASOS's 'Eco Edit' labelling easily understandable, others did not find it helpful to educate themselves about the functioning of ASOS's supply chain. This part of the group, consequently, concluded that the origin of the raw material and the narrative brands around it, such as Orange Fiber, is the most valuable aspect. Additionally, the group agreed that whether the narrative of the brand is based on its certifications or on the raw material, the smaller the company, the more credible it is.

The interview continued by asking participants, whether a diversification or differentiation strategy would be more credible. The respondents agreed that a diversification strategy may be more credible than a differentiation strategy applied by start-ups looking to grow their business. The group agreed that leading brands, such as ASOS, slowly integrating sustainability in their product offering, face the sustainability issue as consumers do. Most of consumers are aware of the necessity of a durable shift towards CE and are doing incremental changes in the consumption behaviour. Similarly, leading brands are adopting small changes with the aim of eventually having a green supply chain. These small changes both from the demand and supply sides, suggest how brands, such as ASOS, are evolving with consumers' behaviour and preparing them for a future where CE becomes the new standard. The group argues that even though brands, such as Orange Fiber are much more eco-effective than partially green brands, they are moving much faster than consumers' mindset such that these product offering may influence only a niche target audience.

Additionally, the opinion of the group was that leading players of the industry such as ASOS inspire others to copy similar corporate responsibility policies. Whereas the same may happen with start-up influencing and motivating other entrepreneurs to introduce the market with innovative, sustainable business models, the group agrees that the current 'big players' of the industry are the key actors needed to be influenced and inspired by competitors. The group further argues that, even though Orange Fiber's business model involves around a specific environmental issue, it is also necessary to question how much consumers they reach, given their premium price positioning, and how much their business may induce a shift in consumer purchasing behaviour. They underline how, from their perspective as consumers, ASOS should continue marketing their sustainable clothing offering and insist in distinguishing their regular offering from their green clothing portfolio, because they are brand reaching a large amount of consumers daily. Although they had already purchased on ASOS previously, most of the participants did not know that ASOS Marketplace also hosts small, sustainable brands. In their opinion, in order for this diversification strategy to become clearly visible to all visiting consumers, the ASOS Marketplace as well as the 'Eco Edit' label and product category should be increasingly promoted and made clearly visible on the website. In this same perspective, one of the respondents argued that because of this unclarity and confusion on the ASOS website as well as the lack of concrete and understandable information under their sustainable clothing, differentiation strategies such as Orange Fiber's may be more credible. The tangibility of their idea, meaning the usage of orange peels as a method of preventing soil pollution and embedded value loss, gives the impression of a more eco-effective business.

When asked about whether they feel part of a niche or an evolving part of society, the group agrees that they it depends on the brand offering. In the case of Orange Fiber, participants agreed to feel part of a niche audience. In case of ASOS, more specifically the fast fashion market, when sustainability issues are included in the regular collections, participants feel as part of a generation actively and consciously facing environmental concerns. The group also underlined how the promotional message of brands offering sustainable clothing, influences consumers' perception of sustainable clothing. When analysing the description of the Ferragamo Orange Fiber capsule collection, participants argue that the collaboration communicates the collection as a premium and exceptional product. ASOS, however, communicates ecological fashion as easily accessible in terms of price and availability. In both cases, the group agreed that sustainability and healthy lifestyles have become a trend, which they consider to be a necessary and positive movement. Considering themselves as belonging to a generation functioning and behaving according to trends, brands such as ASOS and Orange Fiber should continue to support this idea of sustainability as a trend but also as a durable solution for humanity. Nevertheless, a few respondents concluded that, in their opinion, such diversification strategies will hardly make the transition to a fully differentiation strategy. This part of the group argued that the price point of competitors as well as the costs involved in logistical changes, make them doubt that such diversification strategies could evolve into a differentiation strategy build upon a fully circular business model.

Next, the interview evolved into questioning whether or not the country of origin matters in eco-fashion and if it adds credibility and self-esteem. The group agreed that the country of origin of raw material matters substantially in the transparency of a green-oriented company. Some participants pointed out that the cliché of garments produced in emerging or developing countries as being of poorer quality, may still be in some consumers' minds. However, when talking about sustainability in terms of environmental and societal development, the group agreed that garments being manufactured, under fair working conditions, in such countries may be considered as a factor adding credibility. They argue that if brands show how workers are treated and how the brand's manufacturing has positively contributed to workers' life improvement, the self-esteem of consumers rises and subsequently adds credibility to the commitment of a brand. Similarly, in the case of Orange Fiber, as the brand educates consumers about an environmental problem happening in Europe and unknown by a large majority of consumers, unlike the cotton plantation problematic of which more consumers seem to be aware of, the self-esteem and credibility of consumers may rise. They further underlined how the country of origin, makes Orange Fiber's business model coherent. Their brand reflects the heritage of Italian, worldwide known and imitated fashion style, whilst integrating contemporary, local concerns such as the pollution caused by citrus waste. When the researcher introduced Orange Fiber's idea of expanding their business to India, one of the countries facing the same problems with citrus waste, respondents remained sceptical and suggested that, as long as the expansion is not built upon exploitation of the population and economy, the business model could be offering a valuable solution to citrus waste management worldwide. All in all, the participants underlined the importance of the country of origin to be linked with the support of a developing country's economy or a local, regional problem threatening human and environmental health.

Moreover, when questioned about where sustainability starts, at the very beginning or rather at the ending stages of the supply chain, the group shared the opinion that CE starts with the demand. At the same time, they also underlined the importance of consumers to be fully educated about the topic, in order for them to considerably provoke a change in production habits. In this perspective, the group questioned which actors of society should be in charge of educating consumers about CE and sustainability. Ideally, governments, institutions and businesses should be insisting in communicating sustainability as the new economic and societal standard. Creating the need seems to be the essential, starting step for a successful implementation of CE. Some participants argued that the circle starts with the communication of the retailers to manufacturers. If sustainable raw material is demanded by retailers, the manufacturers will be forced to change their production habits such that investments in renewable energy and soil treatment increase. Another participant compared the sustainable movement to the animal testing issue in the beauty industry. With the media coverage of this topic, companies started to observe a strong demand and exigency from the demand side and, consequently, began to ban animal testing from their production chain. To conclude, the group agrees that retailers have the financial resources to change the current business models. At the same time, consumers have the power, especially through the internet and the circulation of shocking images and videos of environmental damages on social platforms, to start a global movement and make consumers aware of the threat that humanity is feeding daily.

Furthermore, the next question interrogated whether or not there is a difference between transparency of a company and clarity of the communication of the company. One part of the group underlined that, because of communication, there is a considerable difference between both concepts. ASOS communicates a clear message about their sustainability goals and how they intend to achieve them. However, respondents consider ASOS being transparent, not because of the clarity in communication, but rather because of their regular updates in how their commitment is progressing in form of case studies as well as updated information on their corporate responsibility page. For the group, clarity does not necessarily make a company transparent but both concepts are interdependent and necessary to conquer consumer trust. Orange Fiber's 'easy and simple' idea unites both concepts, as it involves one clear objective, reuse citrus waste, and a transparent and understandable production procedure as they show how the process occurs, from the peel up until the finished yarn. However, the group also points out that the absence of clear ethical policies may make them doubt whether or not the brand is as fully transparent as it aims to communicate. The group concluded that, with the raise of the internet, transparency suggest the integration of videos and evidence of the whole production process on official platforms, such as Nespresso or Lush, for instance, have been doing.

Moreover, the researcher interrogated the group about the influence of social media on their purchase behaviour. The majority of the group does feel influenced by so called 'influencers' or social platforms in general. They agreed on considering social media platforms as the newest source of information. In their opinion, social media platforms may trigger curiosity to discover new brands and inform users about societal issues by establishing a communication. However, they remain sceptical about how brands present themselves on their platforms, as they are aware of how companies are considering social media as the newest and most effective promotional channel. All in all, the group perceive social media platforms as the mediating tool between the educational and promotional role of marketing. They stated that if social media platforms of brands show a balanced amount of promotional and educational content, they feel more likely to purchase or at least visit the website.

Last but not least, the conversation concluded with the participants arguing that, green labels should be revised and feature more than just a certification. With this conversation, respondents agreed to be much more aware of sustainability topics now and perhaps face the fashion industry with more scepticism and make more choices based on the education provided on websites, from now on. As a consequence, the group agreed that green labels should provide simple and concrete information about the specific brand and how it has been considering sustainability in its SC.

Appendix IV. SPSS results of the perceptual map