

An Evolutionary Historical Perspective of Pakistan Retail Fashion Industry

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ABSTRACT

This study seeks to capture the evolution (emergence, diffusion, and transformation) of the retail fashion industry in Pakistan from largely unorganized to modern commerce retail. In particular, it strives to understand this evolution of "collective activity" as conceptualized by Regina Blaszczyk in terms of interactions among enterprise, culture, consumer, and commerce in the context of emerging economies with an emphasis on past two decades 1998-2018. Chronological narrative analysis is built from Project oral histories (16 in-depth interviews from various experts as well as ordinary consumers, who lived through and witnessed the evolution), supplemented by newspapers, magazines, web articles, and archives. The study demonstrates various political, cognitive, socio-cultural challenges and opportunities faced by early designers/retailers. It also establishes popular culture profound influence in the dissemination of fashion and branding the industry despite political upheavals. Although limited to the Pakistani case, this research outlines the founding feature of the flourishing fashion retail industry in emerging economies and the role of popular culture in the nourishment of creative industries. The evolution of fashion retail in South East Asia in general and Pakistan, in particular, has received very little scholarly attention. The historical analysis contributes a unique perspective in understanding drivers of this evolution as not consumers themselves but the ones who played an active role in the creation of the retail fashion industry in Pakistan build through historical narrative.

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INTRODUCTION

Fashion is a global industry having a huge economic, political, and cultural impact across the globe (Craik, 2009). The concept of fashion originated in the mid-fourteen century in Western Europe (Reilly & Hawley, 2019). The spatial, social and economic organization of the fashion industry passed through cycles (Miller & Merrilees, 2004) and gradually spread all around the globe. For example, fashion has been one of the most influential phenomena of the west and found extreme spatial concentration in Paris, Milan, London, and New York, also known as fashion capitals (Wenting, 2008). However, owing to the shift in patterns of productions and consumption, diffusion of fashion toward the East happened at an accelerated pace (Craik, 2009). According to the McKinsey Global Fashion Index, the year 2018 was the tipping point when more than half of the apparel and footwear sales were outside Europe and North America (Ahmed et al., 2018). Emerging Asia Pacific countries are appearing as the major drivers of this growth (Ahmed et al., 2019) and new fashion capitals are emerging in India, China and Singapore (Craik, 2009; Lee, Moon, & Tu, 2019). Besides expanding segments of market and

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patterns of fashion consumption, forms of fashion retailing have evolved as well (Craik, 2009; Lee et al., 2019). From unbranded retail to branded designer fashion houses and new forms of marketing for fashion brands have transformed the economics of the fashion industry. Presently, China is leading the revenue generation in global comparison (Statista, 2019). The growth is happening in terms of not only the consumption of international fashion but also in the creation of local fashion retail brands and their increasing presence across the globe. Likewise, economic expansion is evident across Asia such as India (Ahmed et al., 2019), Malaysia (Teo, Nik, & Azman, 2019), Turkey (Belbağ, Üner, Cavusgil, & Cavusgil, 2019), Iran, Pakistan (Kalish & Planer, 2013) etc. due to the rising middle class, educated, tech-savvy and upwardly mobile consumers. Among the South Asian countries, besides India, Pakistan is fast appearing as an emerging fashion retail market. This research focuses on the case of Pakistan, as this country has followed a very interesting cyclical trajectory to emerge in the global fashion industry scene in terms of fashion adoption and retail presence. After gaining independence from the British colony, Pakistan was on a progressive modernity path and was considered among the early-fashion adopters in the 60s and 70s; The fashion industry came at a halt during the late '70s. The rise of political Islamization and conservatism badly affected the country's progressive fashion industry. However, with the dawn of the new millennium, the popular culture shouldered the society and the fashion industry saw a rising trend. Global forecasting firms, Deloitte and Planet Retail have included Pakistan, which appears to be off the radar screen for the most global retailers, in the Long term growth potential for modern retail, projected to reach 9% by 2020 (Kalish & Planer, 2013). A sizable part of this growth will focus on non-food and food retailing. From 1998, the Pakistani retail fashion industry has grown multifold, evolved into a functioning fashion industry carving niche identity, and steadily accumulating representation in the international fashion scene. Current revenue in the fashion segment amount to be US\$ 763/million and expected to show an annual growth rate of 34.5% (Compound Annual Growth Rate 2019-2023), generating market volume to US\$:2,494/million by 2023 (Statista, 2019). In this study, we take the historical perspective to describe the emergence of the fashion industry (from 1998-2018) in Pakistan, its gradual diffusion and transformation through popular culture as the collective activity of social systems and interaction among various institutions and individuals (Błaszczuk, 2011) that marks the coming of the booming fashion industry in the Pakistani context. This is important as the evolution of Fashion as commerce, and retail industry is well documented in the west (Craik, 2015; Gilbert, 2019; Miller & Merrilees, 2004), but there is a gap in the most emerging markets of Asia except for high-end fashion industry in India (Khaire, 2011) and China (Lee et al., 2019), particularly the need to build on research that has looked into the role of popular culture (retail formats and news media in the dissemination of fashion to mass marketing phenomena) in the making of industry brand (Bajde, 2019) In doing so, the study will contribute in extending the understandings towards the cognitive, political, and socio-cultural challenges brought by the newness of the industry. Popular culture discoursed around the regime of two political-military leaders/dictators, one for the devastating and the other for booming media and fashion.

Early days of the fashion retail industry in Pakistan

Pakistan was a British colony until 1947, and in its early days, fashion was limited to unstitched clothes, mostly traditional garments inspired by partition such as Sarees, Ghararas, Shararas, etc. (Ismail, 2018) (refer Figure 2.). Clothing for the most upper class and all middle class was tailor-made by the family seamstress for special occasions and ladies in the house

for casual use (Siddiki, 2018). That was also the time when most girls were taught the craft of stitching at home. Ready to wear was unprecedented like the West, where it had already emerged as a mass marketing phenomenon since 1940 as a result of the industrial revolution (Zhao, 2012). There were no boutiques or departmental stores, and people used to acquire fashionable clothing either by tailoring at home or relying on family/local seamstresses (Z. Ahmed, 2018). The predominant form of retailing was unbranded loose fabric retailers, even for special occasions. In the early fifties, departmental stores and small scale boutiques were the first formats that appeared in the organized fashion retailing arena with limited reach (Ahmed, 2018). Among the pioneer's departmental stores were Karim Buksh (1952), Lahore and Sanaullah (1958), Karachi. Due to weather conditions cotton, voile, and lawn were popular, but a lot of imported synthetic fabric was also available at bara (Smuggled) markets at the outskirts of big cities (Siddiki, 2018). From very few departmental stores and boutiques (1947-1997), the industry witnessed the steady rise of specialty retailer of private label apparel brands (SPA) also known as fast fashion (C. H. Lee et al., 2014) to satisfy the mass-market need of branded fashion (both ready to wear and unstitched). Since 1998, SPA brands played a dominant role in the diffusion of fashion retail and commerce, offering quality branded unstitched, ready to wear apparel, accessories, and home furnishings. The Pakistani fashion industry is concentrated in two cities (Karachi and Lahore) with retail presence in all major cities. Over time it has evolved into an established functioning industry earning revenue of US\$:763/million (Statista, 2019) and 128 fashion designers (Sattar, 2017). Like other fashion centers of the world, there is a regular presentation of designs (fashion weeks) for Haute Couture, flourishing retail presence (modern malls and retail formats), media coverage, training institutions (fashion design schools) and other supporting enterprises (fashion photographers, trade associations, Image consultants).

This study is organized as follows. First details of sources, methods of the sample, data collection and periodization logic are explained. It then gives a brief overview of fashion (Blaszczyk, 2011) and history on the evolution of the world fashion industry. It then introduces the context of the Pakistani fashion before 1998, notable developments made by early designers in retail formats, brands and effects of political Islamization. Moving on to chronology of events (1998-2018) that led to the development of the modern retail fashion industry, highlighting the role of popular culture, challenges of a new industry and opportunities. In the end, concluding remarks summarizes the key findings.

SOURCES AND METHODS

Building on the call of Schwarzkopf (2015) for the need of paradigmatic shift for historical marketing researchers and historical narrative needs to be constructed through the experiences and voices of ordinary customers. This research undertook to recognize the development of human consumption from the social and cultural points of view over time in the emerging retail economy of Pakistan. Both primary and secondary interview data were used. For primary data, 16 one to one personal in-depth interviews were conducted in the period between November 2018 to June 2019 through project oral histories. Secondary data included video and print interviews published on youtube/news/blogs for another purpose. It also made use of newspaper/magazine articles and webpages.

Interviewing is the foundation of oral history (Sommer & Quinlan, 2018). Hence recruitment of interviewees to reflect the logic and power of purposeful sampling through “Key

Knowledgeable”, a term preferred over key informants (due to negative connotation) (Patton, 2014) as such people with great knowledge, accessibility and willingness to share were identified to shed light on the historical journey of fashion retail industry in Pakistan. The purposeful sampling strategy of key knowledgeable was used in combination with maximum variation (heterogeneity) via four potential clusters (Creswell, 2007) to capture common patterns emerging from history to develop chronology during data collection (Patton, 2014). Refer Table 1 for details of data collection clusters.

Table 1:
The cluster of data collection

Fashion Academia	Fashion retailers (SPA Brands)	Fashion Media	Fashion Auxiliaries
Heads of the fashion schools in Pakistan	Owners/Senior level managers who have been working with the retail fashion brand since inception.	TV actors, Editor of fashion section of newspaper and magazine, Fashion critiques, bloggers	Heads of Fashion councils, fashion photographers, government organizations and fashion literate Common consumers

Clusters demonstrated a great deal of variety related to fashion retail industry, consisting of experts (for example the first expert was a professor emeritus of one of the leading art schools having more than 40/years of experience in the field) who has witnessed the evolution from professional as well as everyday consumer (Plumer, 1983). Nine respondents were male, and seven were female. Semi-structured interviews spanning from 30-90/ minutes were conducted. Participants were asked about their name, industry experience, background, time of entry in the industry, their life experience as a consumer as well as professional of fashion. To fulfill ethical consideration, participants were requested to sign a consent form to participate in the study. Studies of Miller and Merrilees (2004) and Craik (2015) were used for instrumentation of semi-structured interview protocols questionnaire. However, the flow of the interview remained fluid and opened depending upon the interviewee’s flash of memories.

Periodization

To divide up the expanse of time into understandable chunks, periodization, the turning point was considered as the most appropriate (Hollander, Rassuli, Jones, & Dix, 2005). It is considered as the most logical and acceptable method of periodization because it is viewed as a function of the subject being studied (Stowe, 1983) and used for marketing history (Fullerton, 1988). This historical project was approached ex-post inductively through carefully analyzing chronology of the unfolding events leading to evolution and epiphany (the turning point of retail development). It was found in 1998 when the first fast-fashion retail outlet established its presence in the market, and many others followed, initially gradually but triggered soon after until to date. To address the limitation of periodization such as reductionism, consistency, false sense of progress and duration of periods (Hollander et al., 2005) a brief overview of history is incorporated from 1947-1997 to acknowledge the role of early untrained designers as well as to trace the factors constricting the progression of the retail fashion industry.

Fashion as Interaction Among Culture, Commerce and, Consumer

French word "la mode" refers to the collective manner of dressing, first appeared in 1482 (Remaury, 1994) and has been taking different meanings since then. From indicator of social class to a dynamic system of novelty transformed by capitalism and development of west (Lipovetsky, 1994), dominated by feminine styles in the nineteenth century to a cultural industry driving consumption as opposed to mere utility. Hence, fashion is treated as a system of institutions that produce the concept, phenomenon, and its practice (Kawamura, 2018).

Sociologists have examined the social nature of fashion with people, networks, and institutions that result in the fashion system (Crane, 2012; Kawamura, 2011). They viewed fashion as a collective activity resulting from deliberation, conflict, and negotiation within the network of individuals and institutions, particularly commerce, culture, and consumers (Blaszczyk, 2011). Commerce, in the form of retail, played a foundational role in creating, establishing, and maintaining fashion. The work of Regina Blaszczyk (Blaszczyk, 2011) offers a rare sight of the fashion industry that attempts to understand connections among enterprise, society, and culture. To know how fashion system works, we shall build on her research in furthering our understanding in examining the relationship between commercial enterprise (shopping malls, boutiques, departmental stores, SPA formats), other firms (fashion councils, fashion design schools), Ethnic groups, trade associations (Textile Development Authority of Pakistan - TDAP and Ministry of Commerce) and industries (Textile and Media) (Blaszczyk, 2011).

A Brief Note on the World History of the Fashion Industry

The world's fashion industry took place with the formation of the first couture house in 1858 by Charles Frederick Worth in Paris (Marly, 1980). He not only designed dresses for Empress Eugene in 1860, was the first to sign them, but also invented the word couturier (designer) as a new profession and, most importantly, redefined the nature of the relationship between designers and consumer (Wenting, 2008). His efforts successfully translated the fashion in terms of marketing and production. Before this, even the most talented dressmaker was considered as a servant in the social hierarchy (Wenting, 2008). Paris commanded the fashion industry in Haute Couture (made to order) until the second world war 1941 (Wenting, 2008). Major social and cultural changes challenged the stronghold of Paris Haute Couture, and by 1960s, youth culture and trends associated with popular culture adopted ready to wear (pret-a-porter) fashion (Craik, 2009). This lead to marked shift and diffusion in the spatial concentration of the fashion industry to London, New York, and Milan (Wenting, 2008). As a result, other cities grew faster than Paris, and new fashion hubs, e.g., Beijing, Tokyo, Los Angeles, Mumbai, Shanghai, Sao Paulo, Moscow among others, started arising (Remy, Schmidt, Werner, & Lu, 2013). Two trajectories are evident for non-European fashion capital, one where local fashion is supplanted and adorned by western fashion and dress (such as South East Asia, China etc.) and second where European Culture has been imposed upon (Such as Australia, Brazil etc.) (Craik, 2009).

Fashion models of Haute Couture and ready to wear fashion are not only distinguished in creative processes, manufacturing procedures, and distribution channels but also their accessibility and marketing (Zhao, 2012). The fickle fashion system of haute couture made it challenging to pledge sustainable economic means. Hence couture labels turned to designer perfume, sunglasses, watches, handbags, footwear, jewelry (Craik, 2009) and ready to wear.

Ready to wear can be divided into two categories, prêt a porter and fast fashion. Both target large clientele at affordable prices. Particularly fast fashion requires unique challenges of predicting a trend, planning quantities and inventories for production of quality apparel at affordable prices, following a consumer-based approach (Gabrielli, Baghi, & Codeluppi, 2013).



Figure 1: *Pakistan First Lady Begum Rana Liaquat Ali Khan wearing traditional clothes at a political convention*

Source: Newslines 2017

The Pakistani Context of Fashion before 1998

The fashion industry of the subcontinent followed the socio-cultural development of Haute Couture tradition in France. “Darzi” or dressmakers were considered a low-status craft, and affluent class used to have family dressmaker visiting their home to fulfill the requirements of clothing, particularly on special occasions (Siddiki, 2018). Fashion was never an isolated factor of mere clothing but always remained connected with changes in the political and social values of the country (Patel, 2018). After the independence, Pakistan's first lady, Begum Rana Liaquat Ali Khan (wife of the then prime minister) had a penchant for traditional Gharara (refer figure 1.) so as Fatima Jinnah (sister of country's founder) who also opted for cotton gharara (M. Rehman, 2017). Later it was Begum Naseem Akhtar Aurangzeb (Then President General Ayub Khan's daughter) who set the trend for fashion in sarees and shalwar Kameez even on the political horizon (Ismail, 2018) along with famous film stars Shamim Ara, Zeba, Tarana and Noor Jehan (Isani, 2013b) in glory years of cinema. Before the decline of Pakistani cinema in the 1970s, the film industry was producing more than 200 films annually (Faruqui, 2010) displayed in 1300 cinema houses (Gazdar, 2019) demonstrating dynamics of popular culture; still the wardrobe was “tailor-made” instead of “designer made” (Siddiqui, 2018).



Figure 2: *Traditional Fashion Silhouette, gharara & sharara after partition*

Source: Newsline, 2017

Several self-trained creative entrepreneurs' designers set the stage for making of Pakistan fashion industry, mostly women, who had a flair for fashion and established their enterprises both in unstitched and stitched clothing, retailed in boutique formats. The first couturier in Pakistan fashion history was Sughra Kazmi, who took ownership of rich Muslim "Mughal heritage" and built her brand around the same ethos (Isani, 2013b). She also created ethnic wear for miniature dolls, which were later customized for women, exported by Artistic Milliners, a textile exporting company (M. Rehman, 2017). A limited quantity was also retailed in Karachi at the famous Bohri bazaar of Saddar, known for western cuts and style (Ismail, 2018; Rawanian, 2018). Later her daughter in law Bunto Kazmi took over the business, dealing made to order traditional bridal and formal wear hence strictly following Haute Couture tradition. Another creative designer of this era was Zeenat Ahmed, who opened "Sehar boutique" first in Karachi's posh residential area in 1968 and later near Metropole hotel than a commercial hub of Karachi. She also took bulk orders for export to international retailers such as Selfridge, Debenhams, and various catalog retailers in Italy and Germany by showcasing her collection in international fashion shows (Z. Ahmed, 2018). Maheen Khan started in the late '60s as a known seamstress in Lahore, operating from her home. She went for formal training under French designers and formally joined fashion industry in 1972 with her first job at "SHE" magazine (Isani, 2013a) and has labels, "The embroidery House," "Maheen" and "Gulabo" beside designing the costume and embroideries for famous Hollywood movies "The Phantom of Opera, The Golden Age, Sweeney Todd and

many more. She is an internationally acclaimed designer who was once termed as "Coco Chanel of the east" by the Italian press after showcasing her collection in Milan fashion week (Agha, 2016). During the same time in 1973, fashion brand "TeeJays" was launched by first male designer Tanvir Jamshed, who also set up Pakistan's first organized fashion boutique (M. Rehman, 2017), with his signature style Shalwar Qameez known as "Awami" made popular through the only national TV channel (Pakistan Television, PTV) in the famous plays (Kiran Kahani, Tanhaiyaan, Dhoop Kinaray, Unkahi etc.). Teejays designed dresses for 147 plays on PTV and carried out the first fashion show in a college, single-handedly dealt with everything, from choosing models to photographers and shoots (Isani, 2007). Colonial influence of British popularized suits, trousers, and Bush shirt, whereas national dress Shalwar Qameez was considered laborers (lower socioeconomic classes) dress (VCast, 2019). (Isani, 2013a). Zulfikar Ali Bhutto, an eminent Political icon, made an emblem of Shalwar Qameez "The Awami Jora" designed like the uniform. He used to wear this dress for rallies to connect with the masses (refer to Figure 3). Legacy of his brand TeeJays left deep imprints on the fashion scene, Shalwar Qameez was glorified and became an integral part of the economics of Pakistani fashion design. It got a place in dressing code that was allowed to be worn in clubs as a formal dress code and took its place as one way of formal dressing worn by higher echelons of business fraternity (VCast, 2019).



Figure 3: *Zulfikar Ali Bhutto wearing shalwar kameez*

Source: Newslite, 2017

Sehyr Saigol (now the council chair of Pakistan Fashion Design Council, PFDC), who hails from the textile family, launched the “Art Center” in Lahore and held a first fashion show in Lahore with Noor Jehan Bilgrami to showcase block print in 1978 (Hashmi, 2018). Besides this, she also launched the quarterly magazine “Libas International” in late 1987 simultaneously from London and Lahore with 60,000 circulations available at the prestigious W.H. Smith outlet in London among the likes of Vogue, Cosmopolitan, Elle and others (Weekly, 1991). Enter two big chains of retailers into the arena of fashion "Generation" Ready to wear boutique in 1983 (Generation, 2018) and "Bareeze" unstitched in 1985 (Aziz, 2012) both offering locally made cotton/lawn and hand-woven fabrics and clothes suitable to the local conditions. Generation was not just pioneering ready to wear label but the first one to develop standard sizes for women, staying true to roots by offering "tie and dye," ajrak, chunri, appliqué, embellishments, truck art, etc. (Rawanian, 2018). This brand established after three years of supplying clothes to various small size boutiques in Lahore and Islamabad (Ismail, 2018). Daily Imroz, the famous newspaper of that time, covered the launch of the Generations boutique (Generation, 2018). In 1985 Seema Aziz along with her brother, took a personal challenge to make a top-class Pakistani product with the brand name “Bareeze” to meet the highest quality standards at Lahore (Aziz, 2012). She did not hold any formal business education and design background; however, she understood the need for the Pakistani market for a world-class embroidered fabric. Over the years, they transformed the fashion retail scene by establishing 14 different clothing brands of both stitched and ready to wear known for its quality (Aziz, 2012). During the same year, Noor Jehan Bilgrami hand made block print was introduced in Karachi as a form designer designed clothing (Peerzada, 2018). A small boutique also retailed it in an upscale hotel which was very well received by the masses (Ismail, 2018; Rawanian, 2018). Another self-acclaimed couturier inspired by Noorjehan Bilgrami is Nilofer Shahid (Peerzada, 2018). She designed and introduced block prints design for the first time in Lahore through exhibitions, combining it with hand painting on various fabrics and later launched her fashion brand "House of Meeras" in 1991 catering to haute couture and prêt à porter fashion along with jewelry (Peerzada, 2018). Cynosure, a Lahore based retail brand, opened launched with affordable prices, one design in two colors and sizes-small, medium, large (Rehman, 2018). Some styling trends gained unusual popularity, introduced other than formal retail. For instance, a style that becomes the “in-thing” was Pakistan International Airline's (PIA) air hostesses androgynous uniform approved by Ziaul Haq. Naheed Azfar was appointed to design the uniform complying with the rules set by him (Ismail, 2018). This was the time when the media had a lot of censorship. Right after the end of the Islamization era, in 1989, Pakistan’s first-ever fashion show was organized at Karachi (Isani, 2013a). Moreover, soon after it, the revival of the fashion industry started. Early entrepreneurs, media and popular culture dominated the fashion scene. However, the new era brought change, and supermodels replaced the Political style icons were replaced by supermodels. Since the Fashion industry was evolving in Pakistan between 1989 and 1998, and the only parameter for success was to be sold out on exhibitions and shows (Weekly, 1991). Due to a lack of formal training institutes for fashion design and commerce in Pakistan, all earlier designers identified themselves as ‘Self-trained’. There was a scant understanding of the importance of fashion by the textile sector and consumers (Ismail, 2018) but it started to change after 1998.

The Making of Fashion DNA (1998-2018)

Branding an industry requires meaningful convergence of specific social, economic, and institutional developments as opposed to mere shared cultural existence (Bajde, 2019). Pakistan's fashion retail industry emerged through a set of organizations comprising the industry and the unique identity of its products and services. It happened during 1994, Abu Shamim Dawood, a visionary at Export Promotion Bureau (EPB) now Trade Development Authority of Pakistan (TDAP), realized the need to establish a formal institute for fashion design (Ismail, 2018). The following chronology explicates the interaction of fashion schools, fashion councils, popular culture as media and retail formats, awakening of the textile industry, challenges and opportunities that laid the foundation of branding of Pakistan retail fashion industry.

Fashion Schools

One of the major drivers to set the ground of the fashion industry in Pakistan was the introduction of the first fashion and design school. The Vice-Chairman of EPB, Ministry of Commerce late Abu Shamim Arif, envisioned a fashion school in Pakistan (Ismail, 2018). On the recommendation of Mr. Olivier Lapidus, Pakistan School of Fashion Design (PSFD), now called Pakistan Institute of Fashion Design (PIFD), was opened in Lahore with affiliation with L'Ecole de la Chambre Syndicale de la Couture Parisine, France (PIFD, 2018). The entire curriculum, courses, and textbooks were adopted as they were (O. Rehman, 2018). Madam Olga Saurat, director La Chambre, a former student Shazia Waqar of La Chambre Syndicale, became part of this initiative. Most faculties came from the National College of Arts, Lahore, one of the leading art schools in Pakistan (Ajmal, 2018). The mandate was to support the value-added export through the new league of designers and entrepreneurs. Twenty-eight students were in the first batch of this school, out of which 18 graduated in 1998 (Ajmal, 2018). Since then, thirty-eight retail brands in Haute Couture, Prêt-a-porter and SPA category in Pakistan have been set up by PIFD graduates (PIFD, 2018), apart from being employed in academia and the national and international fashion community. PIFD claims to have 100% employability demonstrating the growth of fashion and retail appetite of the country (PIFD, 2018). Another institute, which was established at the same time as PIFD, is the Textile Institute of Pakistan, under the aegis of All Pakistan Textile Mills Association (APTMA) in 1994 at Karachi in affiliation with University of Clemson, USA. The charter was stipulated to create professionals both for textile and fashion design, merchandising, and marketing. This institute too enjoyed a lot of support from TDAP for development. Other fashion training institute includes the Asian Institute of Fashion Design (AIFD), Karachi and Beaconhouse National University (BNU), Lahore (Image, 2018). Currently, there are 22 textile education institutes in Pakistan (Hussain, 2008), both public and private sectors and some of them are working on to offer retail-related fashion specialization (Ajmal, 2018) due to growing market demand. Almost all fashion designers after 1998, the graduation of the first batch of PIFD, are formally trained in the fashion design discipline. Hence the establishment of these institutes is due to the efforts of the related ministry, supporting bodies (TDAP & APTMA) as well as entrepreneurs who capitalize on the opportunity of fashion design as a profession. Before PIFD, two art schools i.e., Indus Valley School of Art and Architecture (IVSAA), Karachi and National College of Arts (NCA), Lahore had design-centric academia too (Image, 2018). Arts schools indirectly influenced fashion and commerce onset in the country.

The Fashion Councils

Pakistan has two fashion centers and fashion Councils; one is Pakistan Fashion Design Council (PFDC), Lahore and the other is Fashion Pakistan Council (FPC), Karachi established in 2006 (PFDC, 2014) & 2007 (Faisal, 2017) respectively.

PFDC, with its head office in Lahore, is representing and promoting Pakistani designers at all levels, both domestically and internationally. Regular fashion weeks has been started since February 2010 (PFDC, 2014) to celebrate Pakistani designers in international fashion week circuits in collaboration with multinational corporations like Unilever and L'Oreal. Since its inception, they have successfully held five fashion weeks and two bridal weeks (refer to Figure 4.) attracting high profile international buyers and media. As a result, in September 2011, eight designers from Pakistan were invited to hold the exclusive show at the prestigious Federation Francoise du Prêt, a Porter Feminine in Paris (PFDC, 2014). They have also signed an MOU with World Fashion Organizations and World Fashion Week to become an official representative in Pakistan. Pakistan has always been known for embroideries and PFDC collaborated with Aik Hunar Aik Nagar (AHAN) for the revival of the craft sector by merging traditional embroideries with contemporary designs (Ajmal, 2018). In the arena of retail, they have a Multi-brand outlet with 9,500 square feet at a mall in Lahore stocking 40 designers, another franchised in India. One of the remarkable efforts is the launch of The PFDC Fashion Active (TPFA), a unique retail concept at Mall One in Lahore on February 26, 2016. It's not a



Figure 3: Pakistani designer at a fashion show organized by PFDC

Source: *Express Tribune*

retail space for shows but to mentor new talent and adds value as to whatever way a designer wants to experiment in showcasing their collection (Saeed, 2016) With time, PFDC is changing the guidelines to educate the industry. They have also brought clear demarcation between Luxury prêt, High Street, and Textile shows to provide a better comparison with each league (Rehman, 2015). Fashion Pakistan Council (FPC) Karachi was the first one to take the league to introduce the concept of fashion council in Pakistan however due to the constant change of its council heads – Chairpersons and CEOs – it's been behind PFDC (Rehman, 2016). The primary objective of FPC is to treat fashion as a business, support local industry and discover aspiring designers for international promotion (Faisal, 2017). The council operates two stores Fashion Pakistan Lounge first opened at Lahore (Tribune, 2010) and then at Karachi. Fashion councils are institutionalizing the fashion in Pakistan by promoting new talent, establishing guidelines and pushing new boundaries, allowed free retail space at PFDC Boulevard store in Lahore and Fashion Pakistan Lounge in Karachi. Also, retail in India with the PFDC Boulevard store in Delhi (PFDC, 2014). They aim to bridge the gap between artisans' craft and the design industry of Pakistan, leading to strong business ties and economic growth (Agha, 2018).

Popular Culture - The Media

Fashion, magazines, and newspapers flourished from the sixties to nineties as the print was the most crucial medium for the diffusion of fashion then (Muhajir, 2018). Mirror, published from 1951-1972 by Zaib-un-Nisa Hamidullah, first female editor of Pakistan who wrote about social life (Ismail, 2018). Later It was closed due to political influences. Monthly English magazine SHE had its first publication in 1963 at Karachi, with fashion covers entertainment and lifestyle (Isani, 2013a). They had been covering various boutiques, interviews of fashion designers, national retail, and international fashion. Woman's Own was another one that started in 1987 with the same profile (Muhajir, 2018). Herald magazine (now Newline) was probably the first one to do a fashion shoot with Designer Faiza Samee in 1983 (Ghaznavi). Among exclusive fashion fronts are Fashion Collection (1991), Diva (2002), Glam (2012), and international magazine Hello (2012) all published by Hum TV Network have been quite successful (Muhajir, 2018).

Pakistan Television Corporation (PTV), set up in 1964, was the only terrestrial television broadcaster covering 90% of Pakistan (Rasul & Proffitt, 2013). The initial 10 years of PTV were glorified to such an extent that even PTV can separate it from the rest of the time.

“With the dynamic mobilization of a wide range of talent, imparting training and skill development to hundreds, introducing innovative programs, presenting for the first time a vivid daily portrait of the country’s varied and vibrant people, PTV’s first decade is aptly deemed the golden decade” (Jabbar, 2017)

Even the very first innovative encounter of fashion in electronic media happened in the golden decade (during 1973) when Teejays boutique enticed the audience with "Awami" shalwar kameez to be worn by their favorite drama actors in soap “Kiran Kahani” (Rehman, 2017) as a natural form of marketing. It was impossible not to think of “Teejays” and "Tanhaiyan" (record-breaking play at national TV aired during prime time) in the same flash of memory (Isani, 2007). Before this usually, "unstitched clothes were sponsored by textile clothing brands and actresses used to get them stitched by themselves" (Junejo, 2018). This was the

time when Pakistan was on the path of progressive modernity before the Islamization of Gen. Zia-ul-Haq (1977-1988) who brought any upheaval (Maqsood, 2017). The progression of fashion was interrupted by the political influence of military dictator Zia-ul-Haq by imposing an explicit ban on broadcast media and the fashion industry on conducting fashion shows. One of the first fashion models, Freiha Altaf, said, "We did fashion shows covered up or camouflaged as cultural events. The public and media would be told we were only walking the ramp for charity" (Qamar, 2015). The change started to spur after the end of Zia-ul-Haq's era. However, political influence continued as there were only three state-run channels until 2000 (Sabir, 2012). Private television channels flourished under another dictatorial regime, led by General Pervaiz Musharraf enjoying the independence to a larger extent, making the electronic media landscape vibrant (Khan & Brian, 2008). Pakistan Electronic Media Authority (PEMRA) upon establishment in 2002, licensed 87 television channels broadcasting news, entertainment, sports and music programs (Rasul & Proffitt, 2013). It marked the beginning of another era of extreme private excess, phenomenal growth, a plethora of choices for audiences, ethnicities, political and public discourse expansion (Jabbar, 2017). Although various TV channels are involved in broadcasting fashion shows, Style 360, launched in 2008 (replaced by Hum2 and now Hum Sitaray), was Pakistan's exclusive fashion, lifestyle and entertainment channel broadcasting national and international fashion news, part of Hum network limited. FashionTV, an international fashion channel founded in France, is broadcasted live via satellite. This channel provided exclusive coverage to various designers, fashion shows, clothing retail outlets. The impact of the cultural products of all entertainment channels is not just popular in Pakistan but spread across the world to the urdu-speaking diaspora of South Asia (Rasul & Proffitt, 2013). From limited coverage of traditional media to access locally as well as the global audience was an excellent accelerator for the Fashion retail industry of Pakistan. Presently, all designers/fashion brands are on popular social media applications, attracting the mass audience and retail presence across the globe through franchising, stockist and resellers.

Fashion Industry Paraphernalia

We cannot separate image consultants and fashion photographers from the fashion industry (Ajmal, 2018). Among the pioneering photographers is Arif Mehmood, which started in 1986. He believes that "It is imperative to document fashion in books because images like these represent a certain era in time. Fashion has become commercial, and people don't priorities bringing forward a fashion book, which they should" on the launch of his second monologue (Qamar, 2014). Another big name is the duo of Ather Shahzad (Ather Zahoor & Shahzad Raza), based in Lahore, who discovered, mentored and groomed a few of the most iconic supermodels. Early image consultants specialist Nabila and Tariq Amin were an essential part of adding a fashion direction on the shoots and during the shows (Ajmal, 2018).

Textile to Fashion Retail Industry

Textiles, despite being the backbone of the Pakistani economy by engaging 38 percent of industrial labor and one-third of industrial productivity, did not play an influential role in producing value-added products (Hameed & Umer, 2017). Traditionally textile mills exported finished products (personal and home textiles) to world-renowned retailers. Some of the early designers such as Zuhra Kazmi and Zeenat Ahmed too took part in the fashion shows and secured various fashion pieces order from Selfridges and other departmental stores, but they believed it was not possible to establish their retail brand back then (Ahmed, 2018). They even

had difficulties in making the samples due to the minimum order quantity requirement of fabric. The textile industry wouldn't even consider hiring a designer before 2000 (Ismail, 2018). The plunge to launch a modern apparel retail outlet (SPA brand) was taken by a Graduate of IVSAA which proved a stepping stone for the fashion retail industry offering handloom fabric "Khaadi" on the high street of Karachi in 1998 when there were only two upscale fashion design retailers at the time (Rehman, 2016). The phenomenal success of SPA retail brand enticed textile giants to follow their retail brands as well. It was only in 2003 when Pakistan's most sought after textile brand "Gul Ahmed," which has been using traditional retail distribution channels for decades, opened flagship retail brand "Ideas." Other textile producers & entrepreneurs soon followed mushrooming apparel retail brands. Today most textile producers are active participants in the fashion retail industry by either having own retail brand (such as Al-Karam Studio, Sapphire, Kapray, Oaks) or producing for fashion designer brand (Al-Zohaib Textile) or both (Sefam Pvt Ltd). Pakistan retail fashion brand landscape boasts 128 designer labels with a presence in all major cities (Sattar, 2017). The accelerated demand for fashion retail has shaped the textile increasing ventures. Even PFDC has a separate spot for textiles to showcase local fast fashion retail designs during fashion weeks.

Fashion Retail Industry

Pakistan fashion retail experienced multifold rise not only in retail space but also in formats. Transition is evident from traditional unorganized retailing formats and distribution channel choices, stockists, wholesalers, counter sale displays at the shop to modern retail formats. Before 1998 there were mostly clusters of shopping districts and high streets. Some streets at Karachi (Zamzama Commercial Area), Lahore (M.M Alam road) and Islamabad (Jinnah commercial) were considered the most suitable place for high-end fashion retail commerce. Other fashion and apparel brands were situated at various locations, and some had Standalone sites with boutiques and departmental store formats. However, with the transition of retail, shopping space, too, has revolutionized with malls taking center stage. These malls are providing an organized mechanism for the fashion industry retailing. Almost every mall has at least one multi-designer outlet, department stores, and multiple fashion apparel designer outlets (SPA brands), attracting a wide variety of target markets in one place. Besides having a Multi-designer outlet for councils (PFDC and FPC), local and international fashion retailers are also present. Lahore has the highest number of malls and exhibits national and international fashion retailers. Karachi and Islamabad are also catching up with this development.

Challenges, Opportunities and Future Prospect of Pakistani Fashion Industry

Any new industry, in its formative years, is vulnerable to the liabilities of newness. As such pioneering trained and untrained "designer entrepreneurs" of the Pakistani retail Fashion industry have faced several social, cultural, political, and cognitive barriers (Aldrich & Fiol, 1994).

Among cognitive barriers, foremost, was that "fashion was never viewed as a business or a career before 1998" (Mariabdesign, 2011). It was more pastime activity dominated by female couturiers/designers (Zuhra Kazmi, Zeenat Ahmed, Neelofer Shahid, Sehyr Saigol) that had a natural flair for creativity/art who also wanted to gain financial independence and started

retailing (Ahmed, 2018). Secondly, in Pakistan, women tend to dress conservatively; hence, it was and still is very difficult to experiment with innovative cuts within existing styles. Maheen Khan said, "I thought by now we would be innovative, creative, driven, but it is like a bad movie. By and large, we are only making what sells — clothes that are heavily embellished or printed, or both." (Haq, 2016). One of the designers Maria B. said,

"For my first show, I cut asymmetrical trousers, and my clients thought I had accidentally cut them wrong. It was interesting to educate not just the clientele but also the people who worked for me. Cutting masters and stitchers said, what do you know, we have been into this field for 15 years, and you are telling us how to do it. It was tough to channelize quality and designs" (Weddingtv, 2011).

The third hurdle was the realization of the value of a designer's input. Zeenat Ahmed said,

"It was not just Nahid Azfar who came forward to design the uniform for PIA's air hostesses, but many others showed samples including me, but since they were not ready to pay for the creation, all stepped back except her" collect Ismail (2018).

People believed that it was all about the fabric, and asking a high price for creating an outfit is not justified. This cognitive barrier existed due to secure access to a variety of material, embroideries, dressmakers, and ample time to carry out the whole activity. Even today, many people show designer's dresses to the local craftsman and made a replica instead of paying for a designer's creativity. Another designer said "Colonial influence fascinated us by the west and we did not value our cultural heritage, not proud of who we are, a wealth of treasure of art in our soul and soil, for the world to recognize who we are" (Peerzada, 2018)

Sociocultural and political barriers were the toughest ones. "It was a time in the seventies where there were good girls and Fashionable girls. The fashionable ones did not get married, so big was the taboo associated with the word fashion," recounts Tanveer Jamshed, the first male fashion designer of Pakistan (Isani, 2007). He managed to revolutionize fashion and to break the taboo at the same time by not just being a creative male designer, introducing "Awami" fashion, creating its demand in high society but by using national TV plays to help diffuse fashion. In his instep profile, he said.

"The British left us with shame for the shalwar kameez. I took that out. We proved that it is not a uniform. We remodeled it and added colors to menswear. It went from the basic grey shades to black and bright blue. Shalwar kameez became exciting. Then it became explosive. The urban-rural divide was erased. I've always said that the shalwar kameez is the Urdu language of fashion. We helped that subconscious integration" (Isani, 2007).

His efforts met another political barrier when then-President General Zia-ul-Haq enforced shalwar qameez on everyone. During the uniform designing for PIA air hostesses, he even remarked to Nahid Azfar, "why can't you design the type of dress you are wearing?" (Ismail, 2018). Nevertheless, with the end of his period, this image was diluted, and Shalwar Qameez was becoming an essential part of the wardrobe and designer's creation, more pro-choice than an imposition, playing a vital role in the economics of fashion (VCast, 2019).

OPPORTUNITIES

The Socioeconomic Rise of the Pakistani Middle Class

It is all socioeconomic rise of the Pakistani middle class that has given a boost to fashion and retail commerce (Rawanian, 2018). The growth of the middle class has been a reliable indicator of significant modern retail development in emerging economies. Pakistan is no exception; its rising middle-class makeup critical segment and exhibiting variation in social and economic positioning (refer Figure 5.). With an increasing portion of women in the workforce, lack of time, preference is moving towards ready to wear and branded clothes (Ismail, 2018). Modern retail is growing significantly faster than overall retail spending as consumers are shifting from street merchants to current, destination-oriented stores. That is one of the reasons why Goldman Sachs lists Pakistan as on the next 11 countries of interest after the top 10 emerging markets. (Kalish & Planer, 2013).

Make way, coming through

Pakistan's middle class households projected to surpass Italy and U.K.

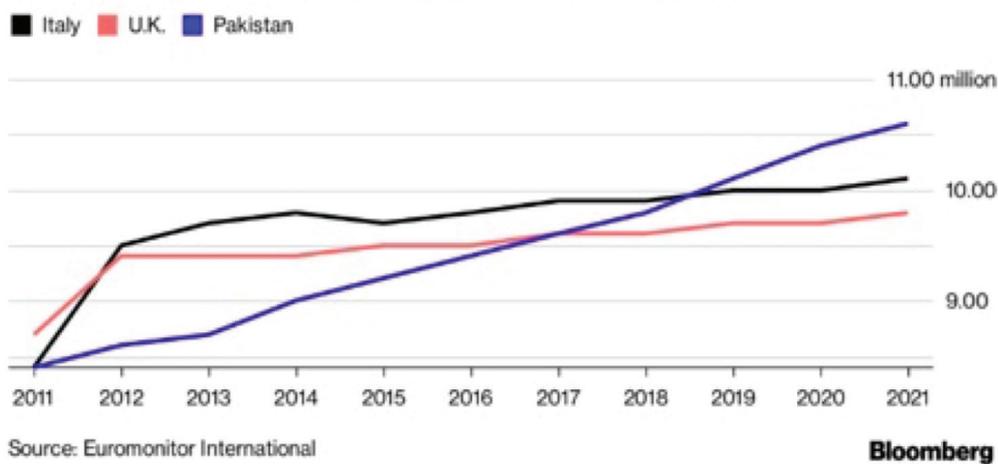


Figure 5: Projection of Pakistan's middle class

Couture Tradition

"Couture tradition is robust within the country; it's the most significant chunk as women spend the most during wedding time, which traditionally has 2-3 days," asserts a designer who is running five successful brands. Observing the rise of fashion awareness, a designer commented: "Now there is not just awareness but demand of fashion as well." "Along with the bride, extended family to is very involved to dress for occasions," hence much buying power (Weddingtv, 2011). Traditional high-end couture wedding had legends within the country (Zuhra Kazmi, Sehyr Saigol, Sana Safinaz, etc.). However, design educated students from PIFD and other fashion schools have regulated the design industry. It produced couturiers whose work and the name is recognized in the world-leading fashion shows. Some of them are only doing Haute Couture (Hassan Shehryar Yasin- HSY) whereas others have ventured into all three categories Haute Couture, Pret a porter and textile (Maria B., Sana Safinaz, Bareeze).

Prêt a Port and Fast Fashion Economics

“It is all about economics, more women working, increase the disposable income, and no time for tailor has given rise to the demand of fast fashion,” commented Rawanian (head of FPC). With prêt a port and fast fashion, things are changing with the gradual acceptance of the fashion designer and affordable ready to wear collections. Maria B. recalled, “instead of launching Haute Couture collection first, I wanted to make fashion accessible. We started with economical ready to wear brand so everyone can afford it” (WeddingTV, 2011). Many other luxury fashion designers have also launched stitched and unstitched collections in low, medium, and high price ranges keeping in view the growing target market of the middle class who loves to wear brand.

Fashion Grads and Growth of Fashion Retail Industry

“Creative, fresh, fashion and textile graduates are truly the wheels currently steering the high street,” a designer said. “The industry has the responsibility to fashion schools to take students on board and help them gain direction,” Dean of IVSAA adds. Creative director of renowned retail fashion brand said, “The growth of high street has been instrumental in getting fashion designing to be perceived as a respectable, lucrative career and made more jobs available to young fashion students.” Initial designers build their business even with single tailor and embroiderer; however, “debutant designers now need space for the workshop, money to invest in fashion week participation and marketing” another designer and faculty at fashion schools explained, due to increasing competition. Graduates are opting for jobs or running small scale businesses with limited clientele due to financial challenges and business acumen to establish a brand (Image, 2018). PFDC chairperson believes “that we are not achieving anything unless we are introducing new designers to the industry.”

Branding Fashion Industry of Pakistan

The initial fashion designs simmered within the cultural fabric of Pakistan. Veteran Fashion designer Maheen Khan said, “The world may not always be aware of it, but Pakistan has always been a very fashionable country” (Rehman, 2017). Early designers used the traditional technique of block prints to create distinct styles on plain fabrics. Our craft is what is unique to us and a competitive advantage that can attract western to come to Pakistan (Rehman, 2015). Four aspects of the Pakistani apparel industry are critical to its development. First is the prevalence of luxurious ethnic craftsmanship such as hand-woven Khaddi fabric, block/hand printing, Ajrak printing (the craft of Indus valley with organic dyes) and traditional hand embroideries. The second was the arrival of designer lawn (a lightweight cotton fabric) in collaboration with textile mills (Rehman, 2017) and glamorizing the mighty fabric to accelerate the fashion retail evolution from everyday casual wear to formal occasions. The lawn continues to be the country's Fabric du jour. The third is the Omnipresence of Prêt a porter, mass fashion and unstitched fabric alongside each other in the retail outlets. Fourth there is an increasing tendency towards the fusion of west and east fashion, but during festivities and special occasions, traditional garments are preferred.

Rise of Retail Fashion Industry and Popular Culture

The history of fashion is intertwined with mass media and popular culture. For example, during the fashion revolution of the 1960's-1970's youth, popular culture, media space challenged the haute couture tradition and popularized ready to wear model (Craik, 2009). Popular culture has a major influence on shaping fashion through music, films, traditional and

new media in creating significant demand (Barnes & Lea-Greenwood, 2006). Creator and disseminator of popular culture can significantly impact the constitution of industry brands, regardless of being a deliberate effort or not (Bajde, Nøjgaard, & Sommer, 2019). Craik (2009) discussed the dialectic relationship between fashion and popular culture for the creation and dissemination of fashion, mainly through the role of media in democratizing fashion across the globe. In Pakistan, the rise of the fashion retail industry is a symbiotic relationship of fashion creators (designers, entrepreneurs) Fashion Icons (models and celebrities) and fashion disseminators (media). Print media was the first to include news of fashion and lifestyle. For example, Imroz daily wrote about the opening of Generation boutique in 1986. Other popular magazines include MAG, SHE, Women's Own among others. With the introduction of Television in 1964, fashion clothing was introduced through soap operas like "Kiran Kahani" "Tanhanyian." Though there were severe restrictions imposed by the state during the Islamization period, media escaped from perpetual political crossfire and emerged as the primary source of fashion dissemination. Morning shows, programs, dramas, and music reach the mass audience to the extent that Pakistan's traditional media is still more impactful, but the digital wave is catching up swiftly.

"It depends on the audience that you are targeting. For instance, it might still be the case that the decision-makers who are heads of families- are those individuals who still do not have access to digital media. On an everyday basis, our exposure is to a select elite circle that the digital media is no doubt influencing in a big way; however, the masses may still be referring to print mediums," says Director, PFDC.

Retailing is a context-driven discipline, and retail characteristics vary across different regions according to local economics, social, and institutional conditions (Miotto & Parente, 2015). In the commercial delivery systems of fashion retail, department stores have a leading role in shaping the fashion industry (Miller & Merrilees, 2004). For example, in Australia, department stores act as market-driving, implying a more proactive role to lead the fashion, especially clothing, accessories, and homeware. Similar trends were evident in other western fashion-savvy countries such as Canada, the USA, and the UK (Miller & Merrilees, 2004). However, in Pakistan, there are boutiques, few departmental stores, multi-designer outlets, and most specialty store retailers (also called SPA brands) offering clothing and accessories. Almost all brands retailing through departmental stores have a vertical marketing system. Other SPA brands are sourcing fabric from different sources with a team of designers. The diffusion of exclusive designer fashion is done through Multidesigner outlet (MDO), establish by fashion councils and independent entrepreneurs. This format of a store is also present in India for high-end luxury fashion (Khaire, 2011).

CONCLUDING REMARKS

The fashion industry has long dominated the west and is diffusing towards the East at an accelerated pace. While China and India are obvious Asian trailblazers shaping the emerging shift, Pakistan retail industry is currently off the radar screen, mainly for political reasons (Kalish & Planer, 2013), despite being termed as a hidden hero in the next generation of the retail market (Deloitte, 2011). Cultural and creative industries in Pakistan have underscored its importance in economics, national growth and generating employment (Evan et al., 2014). Pakistani retail fashion industry, initially on a progressive path, suffered a great setback due to political Islamization of Zia-ul-Haq from 1977-88 and the effects lingered. However the

inertia was dissolved by another political dictator Pervez Musharraf in 2002 when many private channels were given license and PEMRA was established resulting in the mass reach of fashion. It was complemented by the efforts of early self-trained designers, entrepreneurs and visionaries who established fashion schools, fashion councils, the regular presence of fashion weeks channelizing the branding of Pakistan fashion industry.

Pakistani fashion retail industry undoubtedly has evolved within the local socio-economic, political, and cultural environment of the time. Its design traditions are enriched within diverse local traditions ethnic heritage, unique to each province, yet it took advantage of the neoliberal wave from the west and capitalized on opportunities. Consequently, the fusion of ethnic with a keen awareness of global fashion is evident in the retail fashion industry design vernacular. One of the biggest contributions of early designer brand TeeJay was to make shalwar Qameez (Pakistan's national dress) a big part of fashion economics through popular culture. This is evident in the fact that cultural resources will continue to play a biggest role in the social and economic future of the industry.

Popular culture elements such as Print, electronic Media, and adoption of modern retail organized formats are instrumental in the diffusion and transformation of the local fashion retail industry. Retail formats, starting from boutique to departmental store, SPA brand and now multi-designer outlet demonstrate progressing fashion economics are at par with developed retail infrastructure. The increasing presence of organized retailing forms such as high fashion streets and mall culture is providing an added boost to the fashion retail industry. Strengthening existing local retail brands, nurturing the talent of young designers by government, councils, the industry is indispensable for recognition of Pakistan as one of the South East Asia fashion capitals. Pakistani fashion designers already debuted in the prestigious international fashion shows such as New York Fashion Week 2018, and Paris fashion week 2019. Persistent efforts in developing support ecosystems by the government, design councils and fashion industry can accelerate the economic output nationally and increased participation internationally.

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