

# Research report, n°7.

Six-monthly publication – January 2007

## **Editorial**

We need to underline the fact that customisation marks the limits of industrial standardisation while at the same time asking for industrial solutions in order to develop on a large scale, like information systems that can evaluate and reflect the diversity of the aesthetic aspirations out there. Customisation is deployed both in unison with fashion, in as much as it multiplies novelty, and in opposition to a fashion that until now presupposed adoption by widespread groups and identifiable individuals. Is customisation an alternative to the

collective normalisation of fashion? Under what conditions can the market satisfy the myriad of aspirations to inventiveness and singularity? This issue deals with customisation from a number of angles: historical, with the growing segmentation of markets throughout the 20<sup>th</sup> century; economic, with the opportunities that customisation presents to the textile sector; sociological, with the growing introduction of the consumer in the early stages of the fashion production process.

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# Customisation: Fashion between Personalisation and Normalisation

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What is at stake in customisation is its full-scale incidence on a never-before-seen industrial level, that is capable of constituting an alternative both to mass-consumption and the current segmentation and hyper-segmentation of the offer.

Interview /  
 André Beirnaert  
 Customisation Taking over for Industry

From 1990 to 1998, André Beirnaert was Managing Director of the carding-trade activities of the Chargeurs group and since 2004 has been President of the UIT Nord, he also runs the textile competitiveness pole of Up-TEX. He has also been vice-President of the Institut français de la mode (IFM) since 1998, and has just set up Capcusto, a company that aims to develop customisation in fashion.

Olivier Assouly: How do you define customisation? Can it be reduced only to the occasional modifications carried out by individuals on consumer products?

André Beirnaert: My own experience in customisation, comes from the competitiveness pole of Up-TEX, as customisation was one of the two activities. We chose this option in tandem with the research and development programme of the European Technology Platform that also covers this theme: “End Era of Mass Manufacture of Textile Products Towards New Era of Customization, Personalisation, Functionalisation, Intelligent Production, Logistics and Distribution”, within the framework of what’s known as “vision 2025”. It’s obvious that the concept of customisation can not be reduced to the words that describe it, that is, if we accept the implicit description above, and, it is important to give the concept all of its associated characteristics. Having said that, given the sheer scale of the production upheaval that has been predicted, we understand the temptation to simplify this new concept as today, it doesn’t correspond to any known production mode, as it is based on hand-made work in the production of unique items, and is, at the same time, reliant on a form of industrial organisation

that has to be new and unlike current mass production systems. There is no one word that exists that covers the amount of things that need to be done, according to the above description. And this poses a problem. As the concept is not yet clear, it is tempting to reduce it to what we know or can see, for example a decorated car, special hub-caps, or a musical horn (when it was still tolerated!); in terms of clothing, a tag, a piece of braid, a piece of lace or a hole in a pair of jeans. We could list examples and there is a real trend for these practices of personalisation with accessories. But the real issue, that which we wish to emphasise in our competitiveness pole, is the “Brussels” concept. The latest activity summary from Oseo-Anvar, an organisation in charge of aiding and accompanying innovative companies with financing adapted to diverse situations gives customisation a very clear definition: “production that is both mass and personalised, organised in close interaction with consumers and their demands”. The IFM also produced a relevant study on the subject and summarised customisation in a concise manner: co-conception, postproduction in a complex organisation. The dictionary definition of the term is “to build, fit or alter according to individual specifications” (Merriam-Webster). We see that we are faced with a semantic shift that brings an enriched meaning to the word: from the modification of a product manufactured in a standardised production process, we move to the unique production at the request of a consumer. The gap is risky, and if we find a word that is as full of meaning and less marked by reductive practices, I would prefer to use it. As a great plan can suffer from ambiguous terminology. From another point of view, the word customisation exists, it is strongly marked and the word personalisation will not replace it, as it does not include the potential for such broad content. Finally, the success of this new paradigm of production will highlight the concept that has the ambition to completely turn around the current approach by giving the consumer the power

to produce the object he or she will have chose in advance.

O.A: Does customisation imply another idea of the consumer? And if so, what idea?

A.B: We are in the fashion business. Today, the dominant distribution model is that of concentrated distribution. This model is based the relatively sharp, relatively anticipatory, detection of expectations, that results in ranges that are renewed at varying rates, but always mass-produced. According to the talent of the producer, the products sell or end up on sale at reduced prices. We also see signs of stock running out or supplies running out. Finally, as the choice is targeted, the range is rarely that broad according to the target (size, ages etc.) And if, as a consumer, we find ourselves outside the target, we are reduced to a limited and insufficient range of choice. As long as this distribution model works, why change? The problem is, that it doesn't work that well anymore. Due to over concentration, brands have monopolised the market. The over-reduction of risks means the range on offer has become monotonous (which doesn't mean it is not up-to-date and hip) but at a given moment, the choice is limited ("the same everywhere"). Quality suffers from constant price-cutting. Buying in mass from countries with low wages with the resulting deadlines means reactivity is down. But, the consumer is trying to escape the "organised" range on offer available in stores, supermarkets or through catalogue mail order, and is surfing the net, where the market share is exploding. That is the real revolution: the consumer is shaking off his or her constraints, as they have found a space of infinite (in appearance) freedom, that blends the virtual and the real in a risky amalgam that we have not yet fully measured (for example the game *Second Life*). This doesn't mean the consumer is prepared to pay more (that is to say, change his product-price reference), and neither is he prepared to go back in time to the tailor's. To say that customisation is the answer

would be excessive. We can, nevertheless, state categorically that the need for personalisation (and here, I don't hesitate to use the term, as we are dealing with the point of view of the consumer and in the previous paragraph we were dealing with production) is on the same level as customisation that offers the consumer the choice of what will be produced for him. However, the context is the current one with all of the givens and presuppositions of a consumer society: versatility faced with a huge level of choice, zapping between brands and stores, and consumption arbitrages (in the end probably detrimental to textiles).

O.A: What precedents exist, if any, in the area of production? Is made-to-measure comparable to personalisation?

A.B: Bespoke tailoring or made-to-measure is certainly part of personalisation but it is not a synonym. A garment made-especially to fit me will fit me, and most probably no-one else. But have I really "personalised" it? It all depends I think, on the choice available, for example the type of fabric, the colour and the accessories used. It is a subtle and delicate question. In the past, in terms of customisation we should remember that ready-to-wear clothing has only really existed for fifty years. Before that the tailor or the dressmaker ruled.

O.A: Could we say that customisation is just another form of the hyper-segmentation of the demand? Or does it really bring something new to the mix?

A.B: Without a doubt, the ultimate segment is the individual, well, that's what we want him to believe. In any case, I feel that the underlying segmenter is even more subtle and manipulating. If we refer back to the invisible organisation that feeds the consumer's freedom of choice, we see that the consumer can only be led to successive, limited choices. Indeed, how is it possible to supply an unlimited number of options, materials, colours, accessories, shapes, sizes,

etc. without preparing all of the ingredients, which means making them ready to play their role in a systemic process that has been precisely constructed. Which, of course limits at each stage the number of alternative solutions, simply to prepare them and make them possible.

However, to say that this is but a mere form of hyper-segmentation of the demand would be to neglect the unsettling addition of a new-found form of freedom, however constrained. Because this freedom will be seen as a now accessible demand that will disturb the current mass distribution process.

O.A: How can industry take up the challenge of customisation when industrial production is impersonal by nature?

A.B: We just touched on the subject. At the heart of this revolution is a process of intermediary stocks and alternative choices for this stock, materials, machines, work. Of course, work can not be stocked but it can be organised according to flexibility and ease of change. In the same way, extra materials must be available according to the type of work to be done. Finally the "spare parts" must be available or it must be possible to locate them. We see immediately to what extent production, with customisation in mind, will be different from production of big, homogeneous series. In this case, the workers reproduce standard and monotonous moves on the production line that change little over time and produce the same thing over a long period. Fabrics and accessories are bought in large quantities on contracts that, due to their size, give access to the lowest possible prices in direct contact with Asian suppliers. Finally, the production machines (spinning, weaving, knitting in the main) are organised for mass production, at great speed and as a result, are not very, or not at all flexible. In other words, customisation will not be possible with the same industrial structures. The conditions for its success are not size related and as such, the cost of industrial equipment but, on the contrary, low-cost, flexible

machines located in workshops on a human scale. In terms of the workforce, this marks the return in force of the valorisation of intelligent work, as there will be a need for operators that are capable of doing many different tasks and to take the initiative. Finally, customisation creates extraordinary employment perspectives in richer, educated countries with a high level of awareness in terms of quality and service that will, however, need to be paid for accordingly.

O.A: Is customisation in the clothing and textile industry a case apart or does it compare to other forms of production such as the automobile industry?

A.B: Car manufacturing does present many similarities with the systems planned for garment customisation. Today, one chooses one's car: engine, colour, finish etc. We will do the same with our clothing. A system of options will have to be prepared in both areas. If there is a difference, I would see it as the principle of an acceptable delivery deadline. A few months are acceptable for a car, for a piece of clothing this will be a few days. The second difference is in terms of market access. For cars, the purchase takes place for the most part in car dealerships (even though the Internet is beginning to influence prices, and is leading to a generalisation of discounts). However with clothing, if we intend to provide the service expected with a skilled and educated workforce, it will be necessary to invent a type of commercialisation that differs from the current system (that currently determines market prices in terms of lower standards). Customised clothes can be a little more expensive, but not too much. The boutique system (renting a space, salespeople, sales and promotions) is not suitable and eats into the margins. We will need to invent a system that is adapted to the concept of customisation while the automobile industry is still working quite well through the dealership system, for the time being anyway.

O.A: To what extent is the industrial production process ready to integrate and implement changes needed to answer the demands of customisation?

A.B: We also touched on this point briefly above. The industry, in its current state will not be in a position to customise. In fact, what is needed is a flexible system, one that isn't strictly connected, that can be easily modified or adapted, run by skilled personnel trained to deal with this flexibility. In addition, this will demand other circumstances that are far from available today, in terms of contractual freedom in work organisation. And to a certain extent, freedom can not be divided. We are thus faced with a potential cultural revolution.

O.A: What role does information technology, in terms of information and communication, have in the development of customisation?

A.B: An essential one. We could even go as far as to say that without this technology and, in particular, access to storage calculating and transmission of information nothing would be possible in terms of customisation as we see it. And I would like to point out that we are not proposing customisation for one individual but to make the process available to the most amount of people, from which springs the concept of "mass customisation" in Anglo-Saxon literature on the subject, which has been covered in more detail than in France. Here are a few trials to follow: the virtual conception of clothing, the move from 3D representation to flat patterns (2D), and moving from one to the other, in order to find the most popular and appropriate items and thus manufacture the lowest possible number of prototypes. Another possibility is taking the client's measurements with a scanner, injecting this data into the prototype which will then give indications on the size and cut of the garment in real time. Another possibility will be the visualisation of items on the Internet and the possibility to vary the colours, details,

perhaps, one day, seeing oneself wearing the garment. A less spectacular but just as necessary function will be the logistics of the system in terms of fabrics, accessories, manufacturing in the workshops, ordering over the internet and safe payment methods, all of which would be impossible without advances in information technology. Without the continued advances in systems and networks, customisation as an alternative to mass production is just not feasible. Inversely, it is time now to begin, and to get ready in order to be in a position to truly benefit from the innovations to come in terms of IT.

O.A: Is customisation an alternative to the current crisis in French textile and clothing industries? And to what extent?

A.B: On a basic level, of course. This crisis is the result in the main, of the transfer of production to countries with lower wages, to a more and more concentrated distribution system which has made sourcing the lowest possible prices one of its intangible credos. Thread and fabric production logically followed garment manufacturing. Cut off from its source, textile production for garments suffered terribly. Garment production did also, with a not so slight nuance. Someone who makes clothing is still in a position to create a brand and find low-cost suppliers. However, both branches have lost practically three quarters of their size (employees and firms) in the past twenty-five years..

In as much as customisation implies a complete reverse of the production method, due to its reactivity and flexibility, proximity production comes back into its own, in theory. But, at the same time, the effort for conversion will need to be cultural, first of all, and will not happen unless companies are prepared to break with their habits. In addition, industrial support has been devastated. But, the machines needed will not necessarily be the same neither will the way production is managed. In short, everything need to change. So, I believe more in the idea of new entrepreneurs who will more easily incorpo-

rate these new paradigms, some from within the industry some from outside. In any case, they will all need to be imaginative and patient with bankers and investors that understand this new immaterial innovation. Finally, the real resources will come from people, I mean the companies' partners, collaborators who will hold the key to success or failure through the initiatives they take, and this can only work in an atmosphere of trust. What I am saying here is full of nuances of all sorts and does not in any way change the faith I have in our capacities to adapt to this new market.

O.A: Is customisation not, paradoxically, a threat to design (already under threat from Asian competition) in as much as the consumer takes on the role of designer?

A.B: This question presupposes that "design" exists and that in competition with this, consumers would transform themselves into designers who would themselves be relegated to "second rate" or no rate at all. I think this point needs to be qualified. We should first agree on the term designer that in this context the work of an artist recognised as such by the environment (I am purposely using a word with a broad meaning to include everyone). It is true that the consumer can consider themselves in a position to create an artistic, creative work from scratch. The risk of failure is huge, above all in a "customised" approach as we have seen the underlying complexity of the organisation needed. So we must neutralise as much as possible what is a double risk, that of displaying the incapacity of the formula to fulfil the promise (what promise?), and, on a more down to earth level, the production of an unwearable garment. So, the creativity of each individual must be given a framework within which to work so that choices are predisposed and their combination secured. Which leaves each consumer the certitude that he or she is the designer as they will have co-created. Its obviously a little manipulative, but nevertheless practical. We could therefore conclude that the

creative aspect is not eliminated but, on the contrary, reinforced, as the customised product is driven by personal appropriation. The corollary is that the multiplication of creative offers will feed this motor that will, in the end, run much better in its finality of diversification as the wish to renew the customisation operation will itself be stimulated.

I would like to finish with a thought on what this new frontier could be named. Customisation, through the tools on which it relies, and without which it would not exist, takes us to the limits and to the interaction of the virtual and real worlds. I design in the immaterial and I receives a real product. Will I be disappointed or feel valorised? The answer to this complicated question will depend on the success of this new paradigm known as customisation. The strength of the concept of "me within a collective" appears so powerful to me today that the possibility of belonging to this tribe could bring a new form of marketing that will really make the individual the subject of its election.

Traditionally, mass marketing and industry find a point in common in their shared finality of the standardisation of products and services aimed at the largest number of people possible. In reality, what they are aiming for is a cut in costs through the growth in the volume of products and controlling fixed costs linked to product development. But in the end, what is the real motive behind this ideology that has dominated the world of consumption since the industrial revolution of the 19<sup>th</sup> century? Is the sole search for the “variety of product/low cost” compromise supposed to constitute such a competitive advantage in that it excludes all others de facto, or, is it an incapacity to understand the individual urges behind the demand and to produce them at an acceptable cost that has brought us to an economic logic dictated by the “lowest common denominator”? Mass customisation claims to break the locks on mass marketing that, we are told, limits the level of satisfaction of the silent expectations of the consumer. The emergence of personal expression through tools from the Internet –blogs, special interest sites, web 2.0 sites– now constitute the fertile base for customisation, but will the fashion economy be able to find adequate answers to this new challenge while preserving its creative and differential foundations and, without losing its soul? The changes in consumer habits have already largely called into question the basics of mass-market marketing. The markets are saturated with product, consumers now possess in-depth knowledge of products and markets, globalisation has given rise to buying behaviour and motivations that are exceptionally

varied due, notably, to the appearance of new countries in the consumption concert. There is a high level of tension among individuals between their behaviour as citizens and as consumers, the personal aspirations of individuals are climbing Maslow’s hierarchy of needs in industrialised countries<sup>1</sup>. The ambiguity of this issue is that, for all that, it is impossible to pretend that fashion culture, aspiring to beauty and innovation carried by these individuals would be more developed, but it is certain that these same individuals possess more markers to find an answer in line with their expectations, whatever it might be, vulgar or subtle, innocent or expert.

Paradoxically, far from calling into question the laws and practices of the mass-market, these changes have, in fact, pushed the players in the economy to perfect their mode of functioning in order to always better target the needs of their consumer niches without compromising the aggressiveness of their pricing. Taking into account consumer behaviour in the construction of the product range is heavily backed up with consumer testing, behavioural studies, and follow-up of “after-sales” services. So all is well?

Is the “product offer system” capable of adapting naturally to any structural evolution in buying behaviour, even the most complex? Is there a rupture between, what we could term, the “traditional” manner of positioning a product and supply chain, and the way in which a company working in customisation would do so? I have no intention here of coming to a conclusion, I would just like to outline the basic question: on the principle that in the traditional economy, the offer of products and services is the authentic work of a finite group of individuals that are supposed to propose a suitable answer to the silent, or not so silent aspirations of the population, in an expert manner, is it therefore really possible for big companies to satisfy the myriad of individual demands? And as these demands change rapidly, to follow their detours, contradictions and

chaotic rhythms? As, the actual number of individuals that construct the world fashion product range (stylists, product managers, marketing people) is quite limited; this phenomenon is reinforced by the growing domination of world-wide brands that dress a bigger and bigger population with a range that is, in the end, more restricted.

From a different angle, what are the levers that will make it possible in the future to comprehend consumers individually and thus construct a range that is adapted and competitive compared to others?

### Individualisation/Standardisation

The “individualisation/massification” tension of the range is the key to this issue. There is a permanent arbitrage between the necessity to propose an offer that is competitive in terms of price and one that differentiates itself enough so as its sale is not merely reduced to price reasons. This rule will remain in play most probably for a long time to come regardless of the changes in demand. At one extreme, the most personalised response to individual demand is that of a craftsman satisfying unitarily the needs of one person in their presence. The image of the tailor is, of course, the one that springs to mind immediately to illustrate this case, but more generally, we should remember that in Asian culture, buying a man’s suit is traditionally done in this manner alone. At the other end of scale to the craftsman working in made-to-measure, is the paradoxically quite close luxury industry and mass market, both of which, but obviously for different reasons, propose a range that is non-negotiable, to be taken as it is. But this vision of perfection takes us away from the real issues facing companies interested in customisation and their range: operating on a significant economic scale and finding a convincing balance between a form of made-to-measure and a mass-produced product. In another form, the idea is to give the perception of the widest variety possible to consumers while, at the same time, managing to standardise or rationalise the

working methods. An article from the Harvard Business Review<sup>2</sup> proposed a educated segmentation of this type of gradient that constitutes the relationship between individualisation and the standardisation of the offer. The reasoning of the authors involved segmenting the possible approaches to the customisation market by observing the level of adaptation of a product and its presentation (brand, packaging) so as to create four main domains of activity. The idea being that a company that wishes to take on “mass customisation” must position the offer on one of these four quadrants and this positioning must product an acceptable “consumer sacrifice gap” (the gap between the desire for customisation and the actual product). In this representation, the zenith in terms of customisation is the collaborative product that involves the consumer in the design process, that can itself be sub-segmented according to the level of participation afforded to the consumer in the detailed definition of the product, going from the minimum level of ticking off choices proposed in a list, to the maximum level of being given “carte blanche”. This analysis, that is similar to basic marketing techniques, proposes to manage the level of acceptable frustration by giving the company the possibility to propose a product that is seen as being customised at an acceptable retail price. Taken even further, the marketing of customisation is an adapted form of the value analysis theories currently used aimed at finding a compromise between expectations, functionality and cost, but now re-situating the consumer within the construction and arbitration process of the “acceptable offer”. It is, in a way, four-handed marketing. From this angle, the article introduces also the interesting notion of “common uniqueness” that means the capacity of individuals to be aware of their own uniqueness while reproducing typical behavioural patterns. This is not a million miles away from niche analysis that mass marketing has been using for a long time, but it uses this concept by proposing to let the user himself or herself

create the signs of belonging and differentiation with regard to their community. The whole question is an affair of perception and the free will of individuals faced with propositions. One of the basic premises that underlies customisation –a premise that is difficult to show without an in-depth analysis– is that the possibility given to the user to add their personal touch reinforces his or her perception of variety and consequent level of interest.

### Rationalising the product range

The idea of building a “rationalised” product range is certainly seen as offensive by the players in the fashion industry, and to a lesser extent by those in the design world, but it is indeed a major issue of durability for the economic actors of customisation. The case of Swatch in the watch world foreshadowed this principle. To propose a renewable variety at a low cost was a risk to take at the time, and the current positioning of the brand proves not only the solidity of its founding principles, but above all, its capacity to put them into action in a sector that is definitely industrial and complex. Today, there is probably room for a really customisable range from Swatch based on the brand’s capacities for rationalisation and marketing acquired in their niche over 20 years. As for the fashion and textile sectors, mass customisation has often been restricted to the engineers, production managers and IT simulation techies. The offer has often been oriented to “made-to-measure” products with high levels of customisation that have hindered the development of this type of market and compromised the financial viability of the initiatives. In addition, the fact that the customisation debate is centred on the morphological adaptation of the product de facto renders it imperative that the manufacturing takes place nearby. While this constraint was seen as a healthy opportunity to put the brakes on relocations abroad, the other consequence was a hike in cost added to the other costly effects that are part of

customisation –the short series or one-off effect in particular. In addition, by positioning itself as such, the fashion product has always been oriented towards products that are classic, stable, “without risk”, which of course meant they did not match up to consumer expectations in terms of newness, and generated an image gap in a sector that should be giving its clients a dynamic image. The real issue at stake is probably now to define a customised product range that, as with Swatch, proposed an adequate range of standard components, that mix with more complex manufacturing operations in a style offer that is coherent with fashion and the expectations of the “common uniqueness” niches. Probably the most emblematic case among the new approach is currently that of the site [lafraise.com](http://lafraise.com) that, without being a customisation site per se, has created an interesting three-handed relationship in which designers suggest proposals for t-shirts that are then voted on for free by the web-users. Once a tee-shirt gets over 500 votes, the site prints the tee-shirt, pays the artist 1 000 € and sells the shirt on their site in a limited edition until stocks last. So this is a “six-handed” design in which the site only really supplies the carcasses, the ecru t-shirts, and animates the community of individuals that decide spontaneously what can be defined as a large enough niche to justify going into production. This is typical of the Web 2.0 spirit that is currently very popular, but done in a unique manner for the production of merchandise –what is quite unusual in Web 2.0 communities that are naturally suspicious of anything commercial. The German site [spreadshirt.com](http://spreadshirt.com) was quick to identify the originality of the concept going as far as to buy the concept for an undisclosed sum, taking into account that the site’s founder, as the only employee, had a monthly turnover of up to 200 000 €, proving the incredible lever effect of a “standardised” activity the produces a level of variety to satisfy the site’s users. Without a doubt, [lafraise.com](http://lafraise.com) is, in itself, a contemporary replica of the sample consumer groups used by large-scale marketing to validate

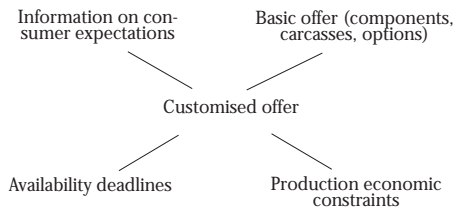
commercial proposals, it is almost identical except that the process here is in real time, and that the size of the sample can be infinite without it costing anyone anything.

### Mass customisation

To get back to a slightly structured analysis, it is absolutely acceptable to question what characterises a customised offer for a company.

- consumer participation in the conception of the product;
- production after the fact (the product is not manufactured in advance);
- almost unitary production or in very limited series;
- an activity on a non-artisan scale, a constructed human organisation.

The construction of the offer as close as possible to individual aspirations supposes complete control over four main, and, in the end, interdependent issues:



#### . Information on consumer expectations:

All recent innovations in information systems tend to enable a better level of comprehension of mass consumption phenomena<sup>3</sup> and consumers in isolation. Data mining, Consumer Relationship Management (CRM), and soon RFID (Radio-frequency identification) make knowledge available on group behaviour and, in parallel, web 2.0 type services spontaneously operated by individuals make room for personal expression. All of this elementary and consolidated data is potentially useable to build an evolved and responsible relationship between the offer and the demand, if, of course the action of companies respects the fundamentals of a democratic society

(respects personal space, actions conditioned on the consent and free will of individuals, respecting commitments...).

#### . Production economic constraints:

Everyone knows, at least in our own minds, that the consumer is not prepared to pay any price for an item, however unique it may be. For some customised products as for any other type of merchandise there is an elasticity of demand, a mechanism that describes the capacity of a consumer to overpay an item in comparison to others, a capacity that is destroyed once the price reaches a certain ceiling. But, the cost of design as well as production grows when the series are limited. So, a very particular expertise is needed to place a customised offer in a domain that minimises this price rise so as to remain within the zone of demand elasticity. This expertise, comparable to that of value analysis that we find in design companies is more subtle than it appears and can be summed up as follows: how to generate a maximum level of variety perceptible to users, while minimising impact on costs?

Constructing a customised offer that is economically viable supposes being in possession of a two-fold creativity that can propose a variety of options seen as the strongest possible, but by mobilising very economical production processes. Customisation companies that have managed to balance their books have all been managed by people with a high level of production experience. This expertise was useable in the manufacturing process but also to position an offer in a clever manner compatible with the possibilities made available through technology. However, we should add that the main point in this domain is to preserve a reasonable level of ambition and not to let the technology become the only issue at stake in customisation, which would take away from the second essential issue, that fashion content of the products.

. Availability deadlines:

This dimension of the offer is very immaterial in general, in particular for a customised offer that, by definition, is not made in advance, and it can become the arbiter of choice: if the design/manufacturing process mobilises a chain of deadlines that are too long, the consumer will necessarily be put off from buying customised products on a regular basis. And, this variable is closely linked to the choices that will be made in terms of production techniques to customise the products. This variable within the offer is strongly dependent on the production techniques chosen, and the availability of the basic components that go into creating the finished product: are they available in stock on site, in stock at the suppliers, to order? The issues surrounding these technical choices is not uniquely a cost issue, but also that of the positioning of the offer of the associated services.

. Component and options offer:

As we said above, one of the keys of economic balance and the potential of conviction for offers of customised products is to propose basic components that are easy to assemble, available as much as possible to limit availability delays, and which enables the construction of a product that corresponds to the qualitative expectations of the moment in terms of style. Here, we are dealing with the major weakness in the customisation sector that, regardless of the initiatives taken, has always bet on traditional products, as they are supposed to be low-risk and conform with the demands of the mass market. Is it not paradoxical to approach a market that is sensitive to trends with a banal proposal? It is interesting to note, that in order to compensate this weakness, the so-called solution has often been quantitative, by multiplying boring options and components. This is where we situate the margin of progression of customisation activities in order to oppose this quantitative temptation with an expert approach and that products that are truly interesting in

terms of style are doable through customisation. Finding the right options in line with the "air du temps" –as a stylist or product manager might say–, that is the real issue for new designers in the customisation sector. Even the European leader Spreadshirt.com is lagging in this area as it merely proposes carcasses (basic garments for printing) with no great originality, even if the broadening of their offer has seriously improved the general quality level.

### Customisation and fashion

Probably the most interesting question in the customisation economy is the relationship to the notion of fashion that will be established: essentially, in this type of activity, the fruit of creativity does not exist in a unilateral manner. The brand –the designer?– propose a sort of creative tool box that will finally end up in the hands of the self-proclaimed designers. What heresy to let people without any skill design their own products! The debate is not recent, but taking into account what has already happened in other design sectors, it is certain that whole swathes of products will feel the impact of this newly available possibility. The most striking analogy must be found in music where under the influence of the digital equipment now available, the possibility has been given to amateurs to manipulate "musical matter" (sampling, loops stitching, mixing, scratching...) and data bases of musical "components". The DJ/VJ culture and the huge economy it created are based on this reality. Is this good or bad for creativity? Of course our first reaction is slightly reserved, even slightly disdainful towards this type of phenomenon, but the debate does not take place at this level. Fashion is basically an affair of "common uniqueness", of self-realising prophecies launched by hordes of gurus, from salvaging and rewriting original proposals in often banal personal stories, cultural brouhaha in short. The process of officially copying styles –pushed to its limits by the biggest brands– and generalised inspiration has already

made the creative process a little vague. What is happening is but another evolutionary step in the mechanism of echoes and multiple propagations between authentic creative propositions and the capacity for individuals to take them on so as to better throw them back in the faces of their creators. The particular difficulty caused by these new markets will be not to take the necessity to produce customised products at a reasonable price as a pretext for soulless products that would be the very contradiction of this positioning. So, who will be the designers and entrepreneurs that will prove that one can do both customisation and fashion, Probably designers, in the most authentic sense of the term.

Laurent Raoul,  
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1. Abraham Maslow, *Motivation and Personality*, Paperback, 1987.
2. James H. Gilmore and B. Joseph Pine II, "The Four Faces of Mass Customization", in *Harvard Business Review*, January-February 1997.
3. See article by Evelyne Chaballier in this issue dealing with these questions on consumption.

### Is the death of ready-to-wear on the cards?

At a time when the fashion system fills the consumer landscape with products and images aimed at provoking desire in a very broad public, is there any sense in dreaming of a “unique” garment by choosing different options proposed by the manufacturer, as if one were buying a computer or a car? European consumers were, for the most part, born in the ready-to-wear age, as such, can they aspire to getting out of this stage to force fashion designers to totally rethink the manufacturing process?

The development of ready-to-wear cannot be disassociated from the “Trente Glorieuses” (the years of post-war prosperity), and more to the point, the newly found access for the middle classes to quality mass-produced consumer products. The appearance of big distribution in out-of-town and edge-of-town sites at the end of the sixties enabled the economic shift of mass produced goods and, at the start of the eighties, the sales of hyper-markets and supermarkets that specialise in low-cost items represented a quarter of the French garment market. Without getting back to Maslow’s hierarchy of needs, the physiological needs and the need to belong were satisfied by the uniformity of the range of products on offer. The development of specialised chains from the middle of the eighties answered needs in terms of self-esteem by the segmentation of the market: the “everything under the one roof” gave way to specialisation.

Revived at the start of the new millennium by the striking development of a few emblematic stores weaving a world-wide web, the concept of specialised chain today retains all of its strength, reflected in a market share of almost 30% in Europe and progression levels of over one point per year<sup>1</sup>. The business models of Zara and H&M that rely on rapid renewal of collections and short series seem indeed to be the most adapted today to the “air du temps” and to constantly revive desire for fashion in a clothes market that is saturated and undergoing harsh budget restrictions. At the top of the range, international luxury or sports brands are remarkably effective in creating a demand for the same iconic objects (a bag or a pair of trainers), from North to South. This attraction reflects “the formidable social diffusion of democratic-individualist aspirations for material wealth and good living”<sup>2</sup>. But does this confluence of desire not merely generate a need for individual affirmation as a reaction? After the democratisation of the offer and mass-distribution, then hyper-segmentation and limited editions, the customisation of the relationship with the end-user client and the concept of “solution”<sup>3</sup> has strongly developed in certain sectors (automobile, DIY, services...) but has only entered fashion to a limited extent. The question, that was already posed in the eighties by a few engineers, Anglo-Saxon for the most part, of production on demand is coming back in force with the development of new technologies and direct Internet access for all consumers. Rather than selling off remaining stock at a reduced price, why not manufacture a product to order that is adapted to the morphology and taste of each person with a choice of sizes and options? History has shown us that innovations that split with what has gone before happen due to the encounter of technological innovation and societal change (the automobile and mobility, elastane and comfort...): is the digital economy the sign we are moving toward production on demand? Finally, there is the direct link, that can be recreated between manufacturer and

consumer through the concept of customisation, while globalisation has parted them. With Asian goods taking over 50% of the European market in terms of value, the clothing sector leads the charge for a number of other industries and any sign, however slight, of the reversal of the trend towards supplies from far away would obviously be examined carefully by the actors from other sectors. All of these questions created the background for the research carried out by the IFM for the competitiveness pole Up-TEX on the theme of mass customisation. Let's begin with a presentation of the concept retained by the study:

mass-customisation =  
co-conception (involvement of the consumer) +  
post-production +  
complex organisation of the different stages  
between the order and delivery.

In this article we will examine the motivations and interest of fashion consumers for mass-customisation that we will compare with the current and predictable proposals.

#### The digital economy is only in its infancy

The digital economy has already changed our lives on a profound level but this revolution, that happened relatively quietly thanks to its rapid and fun-based appropriation by most westerners, has definitely not finished having repercussions in the economic world. Let's take, for example, the development of digital photography that has brought down the traditional giant Kodak and all of the professions linked to photographic development and printing. In a few years, the accessibility in terms of price linked to the progress in miniaturisation and the globalisation of markets has enabled consumers to appropriate the technology and to use editing and special effects software. Some have thus found a manner in which to express their artistic talent and share their "work" with the broad community of Internet users, even though photography purists raise their eyes to heaven. Others, the same people perhaps,

got ahead of the media by capturing the first few minutes of the 2005 tsunami or the London bombings, as cameras and phone cameras enable people to broadcast their images almost instantaneously on the Internet. The blogging phenomenon must be given a mention here, despite its widespread media coverage: beyond the verbal diarrhoea of certain uninteresting ego-trippers, many blogs project the personal investment of their authors and their wish to share well-thought out experiences and expertise. Along with text and photos, videos and personal musical creations are also exchanged<sup>4</sup>. This is a gear-change introduced by web 2.0 technology that places the user and his or her relations with others at the heart of the Internet. According to certain estimations<sup>5</sup>, the "blogosphere" in March 2006 included 150 million blogs in the world with 40 million of those active. And France is even the world champion in terms of blogs per Internet user (0.35), confirming the French attraction for a form of "collective individualism". As Jean-Claude Kaufman shows us, self-expression, as part of individualist modernity, does not produce fruit unless it is accompanied with a feeling of belonging to a community: "The individual, as of now, at the centre of the definition of his or her meaning of life, has problems supplying significant content when he or she is not part of a community. The broadening of the perimeter of identification enables him paradoxically to feel himself"<sup>6</sup>. The first industry to be totally upset by web 2.0 is the media: journalists and advertising execs have, in fact, trained us to express ourselves in small numbers aimed at the most people possible, while web 2.0 organises a gigantic conversation, what the newspaper *Libération* refers to as a "revolution of amateurs".

How can the world of fashion remain enclosed in its ivory tower and ignore the mutations in progress while its designers breathe in the "air du temps" every day? Can we imagine that the bloggers or image-makers that exchange DIY advice and personal recipes, don't want to interact with the

clothing industry? In the course of research on mass customisation, the IFM carried out an in-depth study in January 2006 among a representative sample of 1 200 French fashion consumers: 47% women and 37% of men are in agreement with the proposal "Sometimes I feel like personally decorating a garment".

#### Fashion does not escape the debate on the society of hyper-consumption

On another level, fashion risks, in the short or long term, to "trip itself up" in a frantic renewal rhythm: thus in France, spending given over to clothes has progressed very slowly between 2001 and 2006 while quantities went up by over 20%. A recent study carried out by the IFM<sup>7</sup> reveals the relevance of the H&M and Zara models with their short, renewable series, with the perspective evoked by the actors in European fashion of passing from 4.7 collections per year to an average of 6.8 in 2010. So, the fashion sector thus constitutes a model for other industries in its capacity to provoke desire, newness and happiness. But it can not ignore the debate that is ongoing, on a global level, on the subject of ethics and environmental protection and, in a context where social, political and religious rules are being diluted, consumption could become a means through which one affirms values of identity.

Under real scrutiny from sociologists<sup>8</sup> the trend for alter-consumers is in this vein and it is interesting to examine the contours for our mass-customisation study: with a part of the population between 15% and 30% according to surveys, the fans of this trend are quite wealthy, urban, active and mature (aged 35-64). The plethora of the standardised offer stimulates their desire to possess objects while they reject precisely this too rapid renewal and the production of "fake" new products. While they are against the overpowering presence of brands and advertising in their daily lives, they are not against brands per se, as long as they are in line with their own values. According to Eric

Fouquier: "they are not revolutionary, they are optimists, utopians, activists. They are not against... but for something else"<sup>9</sup>.

In addition they are consumers of quality products, aware of their manufacturing conditions, and are wary of middle men who are seen to grab the profits from the producers. A major part of French opinion seems to share this view. Thus, in the IFM survey mentioned above, 65% of those interviewed are more or less or absolutely in agreement with the opinion "I am prepared to pay more for a garment manufactured in France" and 64% with "I would prefer to buy a garment straight from the manufacturer". The percentage of individuals that agree totally with one of these proposals is almost 30% which brings us close to the estimates of the weight of the alter-consumers in French society. We should mention at this juncture, that mass customisation and ethical consumerism have no visible links in theory, but that the two notions do fulfil the expectations of a population that is trying to escape from mass consumerism. In our survey, 51% of the interviewees interested in mass customisation have "already personally bought fair trade products".

#### Standard sizes fit by default

Another form of rejection of the mass-produced range is linked to an issue that is a recurrent one in the textile sector but one that is less and less accepted by the final clients, that of the sizes proposed in shops and the way they are totally unsuitable for the diversity of morphologies that exist. In the same January 2006 survey, 39% of women and 24% of men are of the opinion: "I have problems finding things to fit me in shops". As part of a European programme carried out for France by the Ifth (Institut français du textile-habillement)<sup>10</sup>, between 2003 and 2005, 12 000 French people had their measurements taken in a 3D cabin that measures 32 points. The results are striking: compared with 1970, supposed to be reference for sizes, French women are taller by 2.5 cms and heavier by 2 kilos, moving from

size 38 to size 40. On the other hand, French men have grown over 5 cms and are heavier by 5 kilos... Beyond these averages, this campaign has enabled to highlight different types of morphologies within the same size as well as a significant change in age conformation. By taking the pulse of their clientele, brands have more or less adapted their size charts over time, which means that there is a huge disparity among the basic models used to establish sizes. Consumers make do, have garments altered and/or choose their size by default when trying things on, which often results in an "average fit".

The situation gets complicated when, apart from age, one must take into account the country and ethnic origin. The Americans have developed a sharp ethnic marketing method relying on observing taste differences in terms of style, colour and conformation between Afro-Americans, Hispanics, Asians, or Wasps. The development of ethnic marketing seems to be slightly embarrassing in Europe and especially in France, where there is a strong attachment to a multicultural integrational approach and individual statistics do not take ethnic origin into account.

Another aspect of the difficulty of adapting size standards to diverse morphologies is linked to a problem that is endemic in Western society, weight: in France there are currently 14 million people who are considered to be overweight to which are added the 5 million obese. As they often find the clothes made for bigger sizes to be unattractive or out of their price range, the consumers concerned are thus pushed outside of the "fashion system".

Finally, we cannot touch on these morphological questions without mentioning the question of the ageing European and Japanese populations and, in the longer term, the Chinese. In societies that are confronted with this ageing and the quest for eternal youth, clothes bring comfort and well-being to older consumers and make them more attractive to others. Why should fashion remain separate from an ageing pop-

ulation that today make up a significant part of the market for cosmetics after over a decade of investment in research and development?

Today, standard sizes that fit individual morphologies badly are being felt in all age-groups, the projective group that we carried out during the Up-Tex study reveals notably the silent suffering of very small or very big young women. With pressure from big name brands (Nike, Décathlon, H&M, C&A), Europe carried out research that is about to come to an end on the normalisation of sizes around three simple and clearly communicated size points: chest size, waist size and height<sup>11</sup>. This approach relies on real measurements, appears more universal than current sizes and will probably facilitate mail order, as proposal charts (chest, waist) for the same height can be broadened with a centralised stock. But the criss-crossing of morphologies, styles and colours will remain limited to avoid over-stocking perishable fashion products that concern only a small category of individuals.

#### Imagine another world...

The above observations show the limits that we have reached today in the way the ready-to-wear market works, with a certain upturn in the renewal rhythms that doesn't prevent the risk of banalisation, it even reinforces it, while consumers aspire to garments where their personal and/or creative preferences are taken into account, as is already the case for other products or services. In parallel, world-wide overproduction and the multiplication of series makes for unsold stock and loss of profit margins. In France, the weight of promotions in garment sales is almost at 30% for 2006, in other words, a hike of 2 points in one year.

Let us imagine a world where the consumers make their clothing choices from among different propositions of fabric, cut and detail (collar, buttons, wristbands, belt...). They would give their measurements (or they would already be stocked on a personal

card) and could even, the cherry on the cake, add a personal signature. The manufacturer would then put the garment into production and deliver it a few days later. The consumer thus becomes the order giver: utopia or the emergence of a ready-to-produce garment? The basics of marketing are a little thrown into disarray with this perspective: usually, market surveys and in-depth data analysis of sale results ends up with products being manufactured that are considered to be the most desirable. The shop displays and advertising campaigns contribute to sales results after the fact. In the mass-customisation system, everything is inverted as the consumer buys the product before it is manufactured and marketing and advertising will be in charge of working with an offer with options and making it visible and attractive: this perspective does not announce the end of marketing, far from it, but it is causing a sea change towards an economy that is piloted, in a controlled way, by the user/client.

Another question, even more serious, is about design; if the clients decide the look and details of their garments, are we not taking the risk of killing creativity and innovation and producing a sea of similar, even unattractive, clothes, that don't even gain the admiration of their peers for the designers/buyers? If this were to be the case, is it better not to launch ourselves into this adventure, the failures of which would be so obvious in our avid society, on the one hand, of aesthetic experience and on the other markers that produce identities within communities that share the same taste. The success of a mass-customisation offer relies, as a result, on the strength of the proposals put out by the designers sensitive to the "air du temps" with a varied, seasonal choice of options. The challenge will consist of placing the cursor between a sufficiently broad product range to answer the expectations among consumers and seasonal, fashion-based collections. Another stress-producing risk is that of disappointment. Certain consumers that we have interviewed are conscious of this problem, especially men:

"It's a risk, all the same, to design your own clothes, it could be nice on paper but then you realise it doesn't suit you once you get the garment" (man, aged 25). Advice in silhouette and combining options would be essential as a result, especially for a client's first order. The same goes for the virtual but faithful rendering of the result before confirming the order, whether this is done over the Internet or in a physical sales outlet.

As we just mentioned, the fact that the starting point for production is in the hands of the consumer does not belittle the role of the design team. They can even benefit from a broader field of expression in order to develop innovative, insolent proposals, the craziness that is today covered up by management who are focussed on sales and stock costs.

**A good fit and personal sensibility to fashion constitute the two axes of structure of motivations for a mass customisation offer**

On the basis of 1 200 interviews carried out in January 2006, 56% of women and 39% of men were considered to be potentially interested in a range of garments by options. A factorial analysis enabled us to highlight two major axes of differentiation within the interested population. The first is linked to the creativity/conventionalism of individuals in reaction to fashion and the second to the facility/difficulty in finding clothes they like in the standard range. All three main groups of consumers interested in a mass-customisation offer can thus be isolated, with motivations that necessitate responses that are different from the offer: the first group concerns people that have problems finding products adapted to their morphology while their taste itself is conventional. They are very frustrated by fashion, don't buy many clothes and aims for basic outfits while regretting the fact the made-to-measure products are rare and expensive. On the other end of the scale we have a second group of men, but mostly women, who are passionate about fashion and have no problem finding clothes that they like in the

current range. They are big fashion consumers, they like small, unknown brands that are a little different. They aspire to take part in the design themselves, to put their personal touch on their outfits: "design it yourself". This section of the population is mainly attracted to new technology and the idea of "piloting" a couture workshop is a very seductive one to its members, whose purchases of customised products will be carried out to complement the standard range, for special occasions and/or particular products. The third and final group, the most interesting probably in terms of developing the offer concerns individuals, mainly women who, first of all, have problems finding clothes that suit them for reasons of conformations and/or specific taste and secondly, express an attraction for fashion and have strong design aspirations: they like to seduce and stand out through their clothes and have huge imaginations when it comes to anticipating the ideal personal offer.

**The current product offer occupies a niche that is developing well but is weak in terms of proposals**

Mass-customisation offers have existed since the beginning of ready-to-wear. In the sixties and seventies they were mainly concentrated in made-to-measure and/or industrial made-to-measure proposed by manufacturers to satisfy a need for a better fit. These made-to-measure offers concerned mainly formal men's wear (suits, shirts) and were swept away, for the most part, in the eighties and nineties by the development of fashion chains, the drop in price of ready made articles and the rise in popularity of sportswear. The diagnostic of the actors present in Europe however, reveals that the new needs of customisation that are emerging among consumers is evident from a redeployment of offers and a significant progression in turnover since 2004. While top of the range specialists like Zegna, are leaders, we have also seen certain proposals in the mid-level range (Devianne or Cyrillus in France, mail order catalogues in Germany...). Despite this take-off, made-to-measure today lacks

attractiveness, the products on offer remain essentially masculine and traditional, with a limited range of styles and fabrics. The constraint of taking measurements is heavy and demands the skill of an experienced salesperson, which creates an accessibility barrier for clients and makes it more expensive. The measures necessary for shirts are less numerous and as they can be managed by the buyer, a number of made-to-measure shirt companies can sell online. They have had a certain success but are penalised by a low level of trust for the first purchase. Without going into the details of the technological aspects, the research that we have carried out shows, unsurprisingly, the importance of technical innovations so that the made-to-measure offer can get out of its limited niche. A first solution could be the generalisation of body scanning, made possible by the imminent drop in the cost of scanners. This perspective implies however that the reticence among certain consumers will disappear, however the analogy with medical scans is not very encouraging for the fashion sector. Getting away from made-to-measure per se, developments in morpho-typing are also on the cards, notably in the mass market, like the questionnaire proposed on the site of the American distributor Land's End, a pioneer in the area: "What is interesting is that the service can be offered only over the Internet. No call centre could gather information as delicate as a detailed description of your bottom (flat, rounded, etc.) or your breasts. No one would dare answer such personal questions out loud", said Sam Taylor, VP of Land's End.

The ultimate stage, that is also relevant to the automobile, furniture and health industries, would involve giving each of us a detailed card with our measurements or a measurement file available at specialised suppliers on the Internet that could be brought up to date on demand. What is not so sure is when this will be possible, ten years being touted by the experts. In the shorter term, the continued progress in 3D imaging coupled with the growth in broad-

band means regular improvement in virtual rendering of fabrics and products from all angles and will make the choice of options on screen easier. Another part of the current offer of customised products relies on what's known as "delayed" differentiation of standard products by adding designs, logos, photos and personal text either printed or embroidered. The consumer's motivation is one of pleasure with variable aims according to the individual and the occasion: to wear a image, a symbol one likes, affirm membership of a community, develop an artistic bent and become a fashion designer, wear your own brand, make a unique gift... The market seems to be booming today with the ease of ordering online and the numerous occasions that lend themselves to customised gear among all generations (clubbing and private parties, amateur musicians, schools and student groups, sailing, role-playing...). The actors present on the market are from different universes: small and medium sized business of clothing, printing or embroidery that develop this type of service to complement their traditional B to B business, people from the textile industry who have set up a specialised businesses and, more and more, Internet start-ups developed by IT fanatics. This development is in line with the culture of web 2.0 mentioned above that entails letting each client design their own things and pay them on each sale<sup>12</sup>.

#### **The sea-change in perspective opened up by mass-customisation raises certain questions**

The first question is about the actors the best qualified to carry an ambitious mass-customisation project and the most appropriate sales methods. Quite early in our research, selling to consumers over the Internet stood out as the priority circuit due to its capacity for touching interested clients over a national, even international zone. The development of on-line commerce has, in addition, become a reality for the fashion market, sales of clothes online having reach 3% of the French market at the start of

2007<sup>13</sup> and passing the 5% bar in the US with a high growth rate. But, at a time when the "click and mortar" approach is becoming generalised, the preference for online sales does not exclude the development of physical sales outlets, that are totally necessary to advise consumers and to gain their trust during a first purchase.

Having controlled the sector since the 80's, big distribution can not permit itself to remain on the sidelines in terms of the emerging modes of consumption and will very probably develop proposals for customised and/or made to measure products. In the short term, it is difficult to imagine this offer being any more than "cosmetic" in its development and minor in terms of turnover for chain-stores not including mail order or Internet sales. To attract a high number of consumers, the prices for personalised goods will have to remain within an acceptable range in relation to the average price of a ready made article: during our survey, a possible increase range of 10% to 20% was mentioned, by the consumers as well as by some professionals, luxury products and exceptional articles not included. The value chain of the specialised chains that rely on minimising manufacturing costs to benefit design and distribution with very high property and refurbishment costs, the business models appear to be very different to those linked to made-to-measure production that is sent directly to the consumer. A solution for distributors would be to develop a specific entity. Manufacturers seem to be in the strongest position while in the US, a growing number of brands have recently decided to "jump in" and start selling straight to the consumer. In this case, the options proposed will probably be limited to choosing measurements, colours and details that are within the creative register of the brand. Innovative smaller and more flexible companies are also in a strong position to propose their ranges and to recapture a part of the profit margin in the value chain, as long as they have the necessary funds for the industrial and IT development necessary to

constitute a reactive chain with their partners and suppliers. Finally, pure players that co-ordinate manufacturing networks and raw materials products also seem in quite a strong position to set this up. Another question is linked to the place of production, the temptation is great to consider mass-customisation as a means to relocate manufacturing faced with the growing power of countries with low salary costs and in particular China. This slight short-cut does not resist an objective economic analysis: first of all, the activity of mass-customisation relies on the transmission of data that is not detrimental to production abroad while transport by place of articles that consume “manufacturing minutes” is frequently practiced today in the luxury goods industry. In addition, it is useful to remind ourselves that Asia has a made-to-measure tradition that is very strong and very much alive specially in top of the range men’s wear, as ready-to-wear appeared later there than in Europe. On another level, there are arguments in favour of production closer to the consumer’s location, whether this means the European Union or Mediterranean countries. The deadline is becoming a key variable in the attractiveness of mass-customisation: here we don’t just mean the deadline given (with an optimum time frame of one week for normal garments, that can be much longer for exceptional items) but also respecting the deadline, as disappointment could be irreversible in case of later delivery. Another thing is the complexity of the organisation of data and materials and the optimisation of deadlines and whether they are favourable to cultural and physical proximity, a source of comprehension between the manufacturing partners and consumers.

In conclusion, the perspectives of the fashion industry have been turned upside down by globalisation of markets analysed to the hilt, and, more recently, by the arrival of new technologies in the everyday lives of consumers. The drop in prices and the concentration of distribution have led to an accelerated rhythm of collection renewal

that is not felt as generating more diversity in the range on offer. The gap seems to be growing, on the contrary, between individual expectation, probably heightened by the acquisition of “expertise” on the Internet, and the current product range on offer. However, according to different surveys<sup>14</sup>, the first condition for a sector to orient itself successfully toward a customised offer relies on the conjunction of two factors: on a consumer level, choices are frequently operated by default, and, on a production level, the instability of the market caused by exacerbated competition. This condition seems today to have been taken on board 100% by the fashion industry.

Finally, the survey carried out by the IFM for the competition pole Up-*Tex* reveals that individual needs in terms of customisation go well beyond cosmetic customisation and touch on structural options such as measurements, fabrics, colours and shape. This article has been consumer-centred, we didn’t deal with the question of the industrial equipment, information systems and sophisticated organisations<sup>15</sup> that will be necessary to establish this “disruption” strategy that combines the performance of both technology and craftsmanship. But, far from limiting it to a challenge for engineers or supply chain specialists, this ambitious project should attract dynamic designers attracted to the possibility of proposing their creative ideas directly to the consumer, marketing specialists that are resolutely “client oriented” and advertising professionals that want to package and make the virtual range desirable.

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1. IFM estimates after a consumer survey.
2. Gilles Lipovetsky, *Le Bonheur paradoxal. Essai sur la société d’hyperconsommation*, Paris, Gallimard, 2006.
3. Philippe Moati, *L’Avenir de la grande distribution*, Paris, Odile Jacob, 2001.
4. The illegal downloading of copyright-protected standard productions evidently is not part of this analysis.

5. Journal du Net, March 2006.
6. Jean-Claude Kaufman, *L'Invention de soi. Une théorie de l'identité*, Paris, Hachette, 2005.
7. IFM survey, January 2007 for Eurovêt.
8. Eric Fouquier (Thema) is the reference in France.
9. During an IFM seminar "Perspectives internationales mode et textile 2006", November 2005.
10. <http://blog.ifth.org>.
11. Article from the Journal du textile, n° 1902, p. 90.
12. See the article by Laurent Raoul in this review. We should underline the growing development of the public interfering in the creative process. Like eBay, Spreadshirt plays the double register of buyer/seller by creating online boutiques for communities (dog lovers to music lovers). The central site supplies the technology and the expertise to create personalised products and sites, the partners do not have to worry about stock, manufacturing or delivery or customer service. In 2006, Spreadshirt bought lafraise.com, a web 2.0 model that through the founder's blog and a call for votes from the community to publish limited series of the winning designs.
13. IFM monthly consumer survey.
14. Thorsten Blecker, Nizar Abdelkafi, *Mass Customization. State of the Art and Challenges*, Hamburg University of Technology.
15. Again, on this point, see Laurent Raoul's article.

DIY appearance is today, as it has already been in the past, a combined use of different exterior signs of garment-related poverty – a poverty effect that of course is striking in a society where clothes are seen as the first outward sign of wealth.

This clothing DIY that plays with juxtaposing poor and rich clothes, old and new clothes – like in the famous marketing cliché of the Chanel/Tati mix –, is nothing new, we saw it all before to a great extent in the late sixties/early seventies. It has always been with us, this fashion for the used and cheap, the recycled and throwaway, the cheap and chic to paraphrase one of the brands who plays with the concept, and is on the increase with the upsurge in DIY and customisation. This is a phenomenon that goes beyond the simple fashion game and is interesting to examine in all of its dimensions: an interest in low price shops (from Tati to H&M) and for second hand clothes, a taste for the used and the old, the aesthetic of the worn and the patched, an (apparent) disaffection for the more obvious brands and a search for more “out of the way” brands, a trend for so-called bad taste and letting oneself go. All of these expressions, largely represented today in this trend for the personalisation of the appearance come together on one point: they all represent a counter-trend to ostentation through the appearance of poverty.

This type of DIY is a recurring phenomenon in the history of clothing and has always existed: from the begging orders of the 13<sup>th</sup> century to the Jansenists, from the clothing

ethics of Protestant bourgeoisie to that of the beatniks. Historically, this is a movement that occurs in reaction to a dominant social model, the dress codes of Saint Dominique or that of Melancthon for example, as objections to the excess of their time. Closer to home, and to bring it back to fashion, the neo-pauperism of Coco Chanel when she started was in contradiction with the ornamental paroxysm of the “Belle Epoque” and the tickling craziness of Paul Poiret, while the pauperism claimed by the hippies was a refusal of this golden age of fashion that represented the sixties and the explosion of ready to wear.

So this “pauperist” DIY is an implicit answer to a dominant current of ostentation. It is a reactive movement, that consists finally of an anti-fashion or a non-fashion as a reaction against the ostentatious fashion system. However, in as much as this system has two dimensions, that of fashion and that of luxury, this reaction takes two forms: the refusal of luxury manifests itself in the refusal of the exterior signs of wealth; that of fashion by the refusal of clichés – from the cult object to the generic clothes of the moment. But these two reactive attitudes can not be compared, and the conclusion is evident: one can produce non-luxury products, one can not produce non-fashion. To refuse expensiveness (or its apparent signs) is simple and obvious, as can be seen in a number of North American movements such as downshifting. However, refusing fashion implies always providing an alternative, an anti-fashion, which is, in the end, another type of fashion. This is the whole paradox of garment DIY, it is supposed to produce individualisation and anti-fashion: it can not, at a certain level of self-expression, avoid producing another fashion.

What are the springs behind this DIY? In as much as it means getting off the beaten track, without becoming a designer or producer oneself, then the existing circuits must be twisted so as to extract clothes that will satisfy this issue: different or, at least, adaptable – whether it be in terms of assem-

bly or the way they are worn. A technique that is also an ethic as it means, each time, if not adopting "real" pauperism, then at least satisfying the first rule: economy. The first qualities of the DIY appearance are often, at the same time as the refusal of the ostentatious and obvious canons of fashion, contesting its economic issues. To produce a non-fashion, means first of all, to produce a pecuniary dis-investment (that far from excludes an emotional over-investment). From this double constraint –getting off the fashion beaten track, not making any material investment but letting, on the contrary, "talent" and personality express themselves, come two aesthetics that vary, according to fashion history, and that we find to be more or less neck and neck today: the old, rich garment and the new, poor garment.

Second hand clothes and cheap clothes, these two sources of garment DIY are never telescoped, superimposed or mixed to the point that fashion loses itself bringing together diverse expressions under generic images and terms, a sort of hotchpotch of ideas that designates reality rather than describing it: from grunge to vintage via zapping and customisation, these "movements" would, for the most part, not have existed as such except for in the heads of those who talk about them, they end up designating anything, when their separate analysis enables us to better understand these trends and, certain changes in our behaviour and attitudes in the way we dress.

The old, rich garment simultaneously reflects a few expectations: the previous life (the used garment) and the never before seen aspect (the unique garment). The previous life deploys an aesthetic of individual use, an already well-used way of getting a unique garment (the jeans I aged myself), rapidly taken up by the brands themselves (we can see, all anti-fashion proposes another fashion), from the faded jeans from Marithé et François Girbaud to the sweaters with holes from Comme des Garçons, to the aged leather at Chevignon to the pre-shined gabardine at Yohji Yamamoto. Even if each

time, the context is different, even if the approaches are individual and the fashion theories of varying complexity, the result plays –among others– on a major dimension, the person for whom the garment has a history.

The second hand garment also plays with this dimension, as it has already been worn, but has another dimension that makes it unique. Far from the mass-produced garment, the second hand garment has the added value of being a unique piece. Here we are getting closer to the idea of a collector's garment, one of the best contemporary examples of which is the "vintage" phenomenon (old clothes that have become classics", and identifiable as such, like old jeans that can be dated by tiny details known only to the collectors), and one of the extensions/claiming by brands is to find in the manufacturing of "new" clothes –or sort of new– in fabrics and clothes that have been passed on. In this domain, the work of Martin Margiela is exemplary, he accumulates three values within one garment: the new (as a new design), the unique (as from a craftsman), the previous life (as it comes from old materials).

The poor new garment also reflects a number of expectations and particularly interesting attitudes. First of all, at the same time as a financial under-investment, it is the expression of an intellectual over-investment from the fashion intention and the effort made to adapt a garment. To use a garment from a cheap distribution circuit is to show a level of intelligence in relation to the garment and its panoplies. It is, implicitly to refuse a "name" designer garment to put one's own name on a garment through expertise and knowing how to choose. To adapt Tati into fashion, is to operate a process of distinction based on competence to the detriment of one's financial means. An attitude that can also, among some, take on a political edge through a refusal of the sartorial attributes of the bourgeoisie.

But beyond this fashion pauperism, should we also be talking about the pauperism of

“out of fashion” that consists, not of claiming the signs of sartorial poverty, nor of playing with them, but simply adopting them because they are the most accessible, the most simple and the cheapest. The contrary of under-investing to over-signify –whether on an emotional level (the special occasion garment) or an intellectual one (the cheap garment)– there is also the fact of under-investing to not-signify, a negation of the values traditionally attached to garments that are the probable consequence of a double excess in the clothes market: on the one hand the hyper-valorisation of name designers; on the other, the extremely commonplace nature of fashions that are more and more seen as “throwaway”. This over-valorisation of the fashion act as an end in itself is probably at the basis of a current of disaffection for clothes, that hasn’t been studied yet, one of the forms of pauperist DIY is but one of its manifestations.

Let’s go even further and ask ourselves if this phenomenon is not extendable to all of the body appearance techniques. One of the marking facts of the second half of the 20<sup>th</sup> century will have been the progressive abandon of a certain number of social marks that were traditionally expressed through clothing, traditions having moved away to leave a relative carelessness in clothing, two good examples of which are the rise in the popularity of sportswear and the disappearance of the notion of “Sunday best”. So among younger people especially, we can see the development of another relationship to the body, precisely based on the absence of constraints: messy, unkempt, relative dirt have more and more their place in a sort of “degree zero for clothes” that remains, also, a form of customisation by lack of investment –a reduction in other words.

Of course, this attitude the minute it is qualified, becomes identifiable and useable as vocabulary in fashion. This dress attitude (or non-attitude) –all the more paradoxical as it meant to be anaesthetic– becomes de facto one of the aesthetic tools used by fashion, whether it is in assembly or the attitude in

which the manner (unfinished and let go, negligent in appearance) becomes a new aesthetic and a stance (research and pose), and the circle is closed: rejection is, yet again, transformed into a model. As Erasmus said in *On Civility in Children*, “a little maladjustment doesn’t harm youth”. A “maladjustment” that is made up of individual DIY, letting go, and of course a fashion attitude, and we can see that it didn’t start yesterday.

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## Personalisation: a New Age for Industrial Production?

Olivier Assouly

During its history, capitalism will have known three ages of production, up until the beginning of the 20<sup>th</sup> century, it was organised around local markets where the products made were produced and distributed within a limited geographical perimeter; the second corresponds to the “massification” of the market with the unification of production and obviously consumption; finally, the last age happened in the twenties, and corresponded to the segmentation of markets in order to answer, and generate the demand of consumers. Our question concerns the possible conditions of the emergence of a new age not founded on the integration of the demand segmented into groups, in which case customisation is but an avatar of the existing segmentation of the market, but on multitudes of scattered aspirations. Customisation means either the hand-made transformation of a mass-produced product by an individual or the integration of individual aspirations in the production process. The question here is to highlight two points, both in solidarity with one another: the first deals with the historical conditions of the appearance of customisation in fashion and other consumer sectors; the second deals with the social issues at stake and the limits of the process.

### The massification of markets

Henry Ford was born in Michigan in 1863, he worked first as a mechanic, becoming an engineer in 1891, a time at which he began to experiment with internal combustion engines. In 1903 he established the Ford Motor Company whose success relied on the massive commercialisation of the Ford T at a time when the automobile was expensive and was the preserve of a tiny part of

the population. Instead of manufacturing a small number of expensive vehicles, Ford took the risk to reduce his margins in favour of an economy of scale and multiplying his sales volumes.

As Ford himself says in his Memoirs, the taste of his clients was low-key, almost non-existent. He concentrated his attention on the technical characteristics of the automobile: the materials were of great quality, the workings simple, the car was absolutely reliable, easy to handle, light and cheap to run, etc. There was nothing superfluous in this vehicle, no decoration or aesthetic fitting, nothing that could correspond to the singularity of preference. To the senses, the automobile is a common object. Each element comes from a technical conception that is dominated by ease of use. Ford was careful not to promote the comfort or aesthetic qualities of the Ford T. The passion of the consumers had to fall back on the functional interest of the vehicle.

The economic equation that Ford set up obliged him to disqualify the previous production model where the automobile manufacturer spent most of his time trying to satisfy the needs and even the whims of the customer. So Henry Ford got rid of the model that was favourable to satisfying people’s taste. Mass production imposed a standardisation that went beyond the simple fact of producing objects from the production line. The producers were aiming at producing the consumer: “We have designed a car whose performance and price satisfy the main needs of each person on average. In the end, we standardised the consumer”<sup>1</sup>. Mass-consumption relies either on the pure and simple exclusion of personal taste, or the capability to produce an average taste that can adapt itself to the majority of personal tastes among consumers.

Throughout his memoirs, Ford sketches the idea that mass consumption contributes to creating superior values within a society: “Its cost (of the Ford T) will be so low that there will be no man on a salary that can’t afford to

buy one –and to enjoy time with his family in the vast nature that God has made for us”. Remarkably, this declaration puts as much emphasis on the utilitarian value of the vehicle as on the faculty it has to satisfy the desire for freedom common to all. Instead of satisfying the disparity of personal tastes, the automobile fulfilled the standard taste of the nation with its cortege of moral, family and social values. Here, while pretending to consolidate the bedrock of democracy, consumption becomes the growing unification of taste. From this angle, mass taste, necessarily average and without bitterness, announced the success of a homogeneous society, as opposed to an anarchical multitude of taste and wishes. Ford contributed to the definition of consumerism in the fact of extending access to products to the entire population. In his eyes, there is no doubt that the economic motivations of the producers, through consumption, are beneficial to citizens and their happiness<sup>2</sup>.

#### The segmentation of markets

Ford eventually showed the limits of absolute standardisation through his refusal to follow the changes in the market that were moving toward more adaptation to consumer’s taste. From the twenties on, after having produced the same car for two decades, his monopoly collapsed. From 1923 onwards, the competition, General Motors, started an annual renewal of the range, unlike Ford, putting the emphasis on the client’s aesthetic demands. While due to the difficulties in terms of management and production, most managers were opposed to this system, the ones that were in favour were aware of the new commercial opportunities available. The new aesthetic became a stimulant that led to a rise in the sale of new cars. It not only enabled them to touch new consumers, but also to extend consumption to those who already possessed a car. By addressing car owners, they evidently had to overcome the obvious risk of market saturation, especially as the longevity of the automobile was part of Ford’s sales pitch.

The regeneration of products meant that the markets moved into a timeframe where novelty created cycles, by exhausting the original taste for objects and generating other tastes and desires, and on and on. In the twenties, automobile manufacturers thus tried to convince drivers that the cars they had were obsolete, even though they were working perfectly. The change was decisive. From then on, the aim was not to appeal to the needs of the consumer but to their taste. So why not put the emphasis on technical innovations in order to seduce the client? This is because technological changes must be limited as much as possible to cost control. They had to conceive of changes of another nature entirely, aesthetic ones. As it was out of the question to threaten the economies of scale that mass-production had enabled them to make, Richard Grant, head of sales at Chevrolet, tried to take the taste of consumers into account by proposing interiors from a range, itself defined by the producer, of different colours and options. This schema has nothing to do with the made-to-measure production model that existed before the standardisation of production. In the first case, the client dreamt up his car that was then built by the producer. In the second case, the client must make do with a limited series of aesthetic or technical options. Inside the company a skilled “style” department, set up for this purpose, was in charge of the aesthetic fittings for the cars. In his autobiography, at the start of the 20<sup>th</sup> century, one of the directors of General Motors questions the effectiveness of aesthetic design: “How far can we go to modify the style of a model? This is a particularly delicate problem. The changes offered must be sufficiently innovative and attractive to create the demand and even a feeling of dissatisfaction in relation to the previous model when compared to the new one”<sup>3</sup>. All of the elements necessary to capturing the taste of the consumer are in place. The aesthetic option is particularly advantageous: it enables the producer to limit costly investment in technology and, above all,

guarantees growing control over the average taste of consumers, voluntarily adaptable to the successive ranges of styles. The producers knew that the taste for the industrial range relied on the mobilisation of emotions and affections. This mercantile set up implied the growing integration of the individual's whim" in the equation of the car business. The demand is taken into account in the organisation of the production process itself. The consumer is thus the centre of gravity of the design in as much as they programme material production in terms of an anticipation of consumer opinion. We still need to cover what style means here by referring to Georg Simmel's analysis. The industrial satisfaction of a taste supposed the production of a style that is the preserve of standard products, with mass consumption in mind. Style is supposed to bring "the content of the life and activity of the person in a shared form with the largest number and accessible to them"<sup>4</sup>. Faced with a work of art, the style interests us even less as it is there to express the unique character of the producer and his or her subjectivity. The work of art addresses itself to what is most personal in the viewer. It is a world in itself, it does not need to fit into to other people's worlds. With the production of furniture, crockery, cars and clothes, for the largest number possible, public taste took on a more general form. So it is useless to search for the unique expression of a soul in a style. All that must come out is a feeling, a broader historical and social climate, For the simple reason that average taste is common, in the way that it is shared by all, mass production style is that which is the most general. While maintaining the horizon where the illusion of the individual as the essential framework for aesthetic appreciation, style is what goes beyond the unicity of people<sup>5</sup>. In this way, mass consumption puts products on the market that have been already evaluated in terms of their chances for success. By bestowing aesthetic qualities on utilitarian products, the merchant sphere generates styles, in the service of mass production, as

easy to integrate for individuals as they are rapidly detachable due to their very generality. Design is a medium term between production and consumption. Under industry's guard, taste must answer three conditions. First of all, it must be able to detach itself from the producer and the production, unlike the work of art, so that it can then exist for the consumer. Then, the success of a piece of merchandise among consumers depends on its strength of collective adoption measured by market studies charged with prediction, prescription and satisfaction of taste. Finally, in order that tastes renew themselves according to fashion and above all to prevent market saturation, the links with consumer goods must be solid enough to justify a purchase, but fragile and temporary enough to be left aside in favour of other products down the line. So merchandise must bring together stylistic properties capable of crystallising temporarily in people's sensibilities. Design is aimed at bringing the aesthetic sensibility of consumers up to date with the level of conception and production of objects. As they are mass produced, the corollary of manufactured goods is the emergence of an industrial and necessarily average taste. This is why design risks leading to the normalisation of taste that, predictable on a grand scale, drag the consumer down to average taste.

#### The limits of the segmentation of the demand

We should logically consider that the current "demand" for customisation is evidence of the failure of the market segmentation model that, unlike hand made goods, is still using a typically industrial production process. In effect, industrial production is confronted with a non personal industrial form of consumption. In the same way as the distinction between the industrial product and the work of art is outlined, there is a comparable difference between an aesthetic experience still commanded by industrial segmentation of demand and more open experiences, meaning ones that are truly

capable of projecting individuality. While the work of art supposes originality and emotion, the industrial products, even one adapted to a limited category of consumers, demands gestures that are formalised and without emotion from its designers and producers. The difference relies on the opposition between the processes that develop within a space of freedom, on an erratic manner where the risk of losing orientation is battled with an intention, a design, an aim, a plan –let’s say an emotional dynamic– (that we will call original processes) and processes that are developed from beginning to end in a deterministic universe following a causal chain in which the intrusion of any emotion is perturbing<sup>6</sup>. The precedence of the product over the work of art relies on the substitution of empirical thought by science, personal action by rational organisation, creativity by determinism, the heuristic by the algorithm, originality by banality, reflexive activities by mechanical activities, expertise by process etc. The rationalisation of the demand of consumers has not only conquered the areas of conception, production but also that of consumption. The way works are received is subject to expectations and desires. The axiomatisation of taste is predetermined and surfaces in the rubbing out of judgement margins and all anomalies. But in every aesthetic experience there is a dark, unpredictable side, in other words, the “accident” that escapes even the conscience of the individual. While in hand-made production, functional forms can vary considerably from one to the next, for the same expected effect, when one starts to produce industrially, the variations disappear. The existence of one right and rational solution only is posed for the problem<sup>7</sup>. The industrial production of consumption has every interest in making these excessive variations between tastes disappear; the simplification of taste being the sine qua non condition to satisfy the masses. The production system is more apt to answer their desires massively if they are clearly defined rather than diffuse. It is a fact that

customisation criticises a production system that is incapable of integrating a demand in what it is most singular, most different to groups of segments of consumers. During its evolution, capitalism has always taken on board the criticism of its adversaries that it deals with this time as a demand for more differentiated goods. Thus, all of the social struggles, that before were occupied by work and the worker, are shifting towards consumerist demands. By answering, often by anticipating, the critics that complain of uniformity and standardisation of goods and services, capitalism produces its own version of social and aesthetic freedom backed up by solutions from the very heart of capitalism. It sets itself up as a force for incorporating these requests for freedom that up until now had been removed from the system of production and consumption. The taste of the consumer becomes the linchpin for future socio-economic mutations. All of the arguments rely on the reassuring substitution of uniform mass consumption by life styles. Thus the objects on sale would obey a classification that is in constant renewal, that comes from culture and notably from artistic culture. And it is this stylisation that would make goods and services desirable, while at the same time enabling consumers to orient themselves freely in the profusion of the range of products on offer. Does customisation consist of enabling freedom of choice to exist in an industrial palette enriched with options? If so, then it just remains to articulate more individual, even boundless demands, and the conflicts that can be sorted out by the market or appeased by a group of specialised mediators made up of advertising and marketing experts. This social chemistry would leave aside any demands judged to be immature or disturbing. Does the segmentation of the growing markets really provide satisfactory answers to the individuality of taste? While the segmentation deigns to answer dissatisfaction, it would be quickly absorbed into ensembles that group together more individual demands in the strict measure of the rules of competitions and

economies of scale. The solution of products adapted to taste appears incomplete, as it is founded on an extra consumption where the aesthetic singularity is again brought back to the weight of an alternative market. Does the market not respond to the demand for individuality by the industrial production of individuality? The success of customisation rests on the following *sine qua non* condition: we should be certain that the customisation processes are not just smoothed out by the market and orchestrated by behaviour charts. In other words, a new age of production, in terms of customisation, will only be relevant if it breaks with the logic of segmentation, however sophisticated it may be. This age of customisation will work through the real substitution of commercial conditioning by aesthetic activity, by replacing individual segments with the affirmation of individuality, by the figure of the amateur taking precedence over that of the consumer.

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1. James Couzen, quoted by Richard S. Tedlow, *L'Audace et le marché*, Paris, Odile Jacob, 1998, p. 191.
2. To corroborate this wish to involve consumption in the social sphere, we should remind ourselves of Ford's own political commitment, notably his attempt at the start of WWI to play the role of mediator for peace.
3. Sloan, quoted by Richard S. Tedlow, *op. cit.*, p. 203.
4. Georg Simmel, *Secret et sociétés secrètes*, Paris, Circé, 2000, p. 56.
5. Simmel's analysis on perfume, like clothes fashion, highlights the combination between style and personality: "Just like clothes, perfume covers the personality by underlining it. This is what makes it a typical manifestation of the stylistic, a dissolution of the personality in general characters that express its charms in a much more striking manner than its immediate reality ever could", Simmel, *op. cit.*, p. 238.
6. See Yves Deforge, *L'œuvre et le produit*, Paris, Champ Vallon, p. 33.
7. In *L'individualisation psychique*, Simondon maintains that "a technique that is absolutely elucidated and divulged is no longer a technique, it is a type of work".

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January 2007, Six-monthly publication

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