

Influencing Factors on Modest Fashion Market: A Case Study

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ABSTRACT

The modest fashion from the Islamic point of view is an emerging phenomenon that offers non-adherent and non-transparent clothes that cover a large part of the body respecting the religious dictates and it is seen as a growing industry in the fashion sector. The objective of this paper is to define a new economic opportunity for the fashion sector represented by Muslim consumers and to investigate the influence of Islamic ethical standards in the fashion which is defined by Shariah to better understand and meet the Muslim needs. From the religious, ethical perspective the study also focuses on the cultural, social and regulative aspect of Muslims some of these elements are considered extremely varied. To get this done, the institutional theory has been employed to systematically investigate the factors Influencing on the modest fashion. This paper takes advantage of case study methodology looking to the Italian context. Our findings stress the importance of the modest fashion in Italy due to the increase of Muslims in the country as well as the interest of the Italian companies in the national and international modest fashion market. Findings also highlight that despite the interest of Italian companies, a large segment of Muslims in Italian market adopts traditional methods to cover their needs and also the Islamic countries markets are still largely untapped by many Italian designers and clothing companies. The study contributes by proposing some influential factors taken from the institutional theory to understand the market needs and in order to access it.

1. Introduction

The Shariah (Islamic law) covers all areas of life through the principle of Halal (P. P. Biancone, Secinaro, Radwan, & Kamal, 2019), the word Halal is an Islamic juristic term to denote permitted act (P. P. Biancone, Secinaro, & Kamal, 2019), the concept of Halal has a moral dimension and aims primarily at the maintenance of society and the dissemination of good morals and noble values derived from Islamic culture (Jaelani, 2017). These moral codes have defined the clothes that Muslims should use especially for women (Mustami, 2015). Halal sectors represent a large share in the economy of Islamic countries where the modest or Halal fashion sector is one of the most prominent sectors with other sectors such as food and services (Alserhan, 2010),(Hanzaee & Chitsaz, 2011). Halal principles represent a clear and fundamental impact on purchasing and decision-making by consumers (Radwan & Shakatreh, 2015)(Shah Alam & Mohamed Sayuti, 2011), many companies around the world have recognized the importance of Halal in building and enhancing effective competition in the market (Fischer, 2012).

According to the State of the Global Islamic Economy Report 2017, the modest fashion market is one of the biggest markets in the global fashion sector and has a large proportion of consumers. Muslims have spent about 11 per cent of the world's total fashion spending,

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which is indicative of its importance (State of the Global Islamic Economy, 2017), and its emergence in the world markets is due to the growing number of Muslims in the world (Hanzaee & Chitsaz, 2011). Further, the Pew Research Center (2017), on the distribution of religions in the world, the number of Muslims in the world in 2015 was 1.8 billion people around the world. Muslims constitute about 24% of the total population density, and therefore the Islamic religion is in second place after the Christian religion, by the end of the century, Islam is expected to surpass Christianity, because the rate of births among Muslims is 2.9 versus 2.2 for other religions, including Christianity. Thus, Islam is currently the fastest-growing religion in the world (Lipka, 2017), and therefore this growth is a significant chance for many companies around the world, including the fashion sector, many fashion companies seek access to modest fashion markets and increase their association with them, but this is often difficult because of the lack of understanding and knowledge of the basic needs of those markets (Hanzaee & Chitsaz, 2011).

Modest fashion is also growing in Italy due to increased interest by the Italian clothing company of the modest fashion market and a significant rise in Italian exports of clothing to Islamic countries in recent years. According to the annual report of the global Islamic economy for modest fashion indicator, Italy ranked third as the best developed Islamic economy of fashion Among 73 countries selected and fifth place as the largest exporter of clothing for Muslim Majority countries worth one billion dollars in 2016 (State of the Global Islamic Economy, 2017). Although there are many researchers who have talked about the topic of modest fashion in general, there is a lack in addressing the modest fashion market in a particular context, for example, Italy and explain factors influencing in this market. This paper tries to cover this gap. Indeed the objective of this paper is defining a new economic opportunity for the Italian fashion sector represented by Muslim consumers and to investigate the influence of Islamic religion, ethical and moral standards in fashion. The study also focuses on the cultural, social and regulative aspects inspired from the institutional theory which play a role in influencing this market to meet the Muslim needs. This paper is organized as follows: section two is concerned with the literature review for explaining fashion in Islamic perspective and modest fashion sector. In section three is explained the institutional theory and its factors. In section four the methodology where it is used the qualitative approach, using case study looking to the Italian context. In section five are analyses and a discussion the Italian case study. Finally in section six the conclusion of the paper.

2. Literature Review

2.1 Fashion in Islamic Perspective

Islam is a monotheistic religion, as it believes in one God, Allah, and has been revealed by the last of the prophets, Muhammad. in addition to the Quran (the sacred book of Islam), the majority of Muslims refer to the words and works of Muhammad, called Sunnah. The Quran and Sunnah are two of the four sources of Islamic law (Shariah), the other two being unanimity (Ijma) and analogy (Qiyas) (Muhammad Ali, 1973). Shariah indicates the rules and precepts that every Muslim must observe in every field of action (religious, socio-political, cultural and economic) and that must follow everywhere both in its relationship with God and in acting towards other men (P. Biancone & Radwan, 2014). These principles and rules emanating from Shariah naturally affect Muslim decisions in fashion (Hanzaee & Chitsaz, 2011). All the Scriptures of the Abrahamic religions stressed the modest standards in clothes, especially for women, as a moral and social virtue, but today it has become the subject of intensive scrutiny in the Islamic context (Sadatmoosavi, Ali, & Shokouhi, 2016). The principle of modesty is a prominent title in Islamic concepts and one of the important parts of the Islamic faith as stated in the Prophetic sayings (Boulanouar, 2006). This principle

is related to covering the Awrah (Certain parts of the body of a man or woman should not be revealed), which is represented by the Islamic dress code (El Guindi, 1999). Since Islam emphasizes the issue of modesty in clothing and the discussion revolves around women's clothing, especially in the public area and its relationship with Mahram (person in whose presence Islamic dress code is not required for example the father) (Al-Qaradawi, 1992; Boulanouar, 2006). The origin in the human being was clear is the dress and the human being before he descends to the earth God created him and chose him to be wearing the evidence of the story of Adam and Eve with the devil and seduction (Siraj, 2011). According to the Quran and the story of Adam and Eve, the human being in his needs for clothing to cover his nakedness. Islam did not decide for people a special kind of clothing but recognized the legitimacy of all clothing as long as it conforms to Islamic teachings (Boulanouar, 2006). Islam called Muslims to virtue and chastity and concealment of the nakedness and urged to adorn the curtain dress, and the preservation of the body and put a set of rules and ethics which is stipulated by the Shariah for regulating it. Cover the nakedness of men and women, so that the protection of morality and preservation of the symptoms and maintenance of the society of decay and corruption and to honour and protect women. The Awrah of the men and women must be covered by clothing. The Awrah of the man between the navel and the knee, for women except for the face and hands. Women's dress should be broad, loose, neither tight nor transparent (Al-Qaradawi, 1992). In Islam, it is forbidden to wear clothes that reveal the Awrah, as mentioned previously, and clothing in which the similarities between the sexes, that is, men resemble women and vice versa (Al-Bukhari, 2007). Islam also forbids extravagance in buying clothes (An-Nasa'i, 2007), clothes that carry symbols of a religion other than Islam and clothes in which there is silk or gold for men only (Ash'ath, 2008). The study of the phenomenon of dress in Muslim women deals primarily with the relationship between society and religion; society as the source of culture expressed by various manifestations in daily behaviour, including the phenomenon of dress and its associated changes in the circumstances of the times, and the considerations of space and time; women must adhere to it. These forms fall within the limits of the legitimate dress. For example, in Egypt Muslim women wear dark Jilbab (long and loose dress) that covers the entire body (El Guindi, 1999). The traditional clothing for Muslim women in Malaysia is Baju Kurung is a shirt loose and long up to the knees with a long skirt with folds on both sides with a veil upon the head (Lie, 2000). AS for in Morocco is used Jellaba is a long dress that runs up to the ankle and is available on the headdress (Boulanouar, 2006). The Haik is a piece of cloth worn by a woman to cover her head, face and body that spreads in some rural areas of the Middle East (El Guindi, 1999). The Chador is a long black dress, worn by women in Iran, which completely covers the body except for hands, feet and face (Reece, 1996). These types of clothing are represented by the Islamic dress code so-called Hijab (the dress that covers the Awrah of women).

2.2 Modest fashion sector

A growing sector in the fashion world is that of modest fashion that is, the one that proposes non-adherent, non-transparent clothes that cover a large part of the body; most of the clients are Muslim women (Boulanouar, 2006), but there are also Jews and Christians (Sadatmoosavi et al., 2016). The world of modest fashion is becoming more and more relevant: it is interesting not only because it concerns a good part of the world population, growing and with new resources to invest in clothes and luxury, but also because global companies are increasingly interested in this market (Hanzaee & Chitsaz, 2011). Some international brands are becoming interested in modest fashion and have already proposed collections for the Islamic world, such as H&M, Zara, Uniqlo, Tommy Hilfiger, and Dolce & Gabbana (Lewis, 2013; Sandıkcı, 2018). Reina Lewis, a professor at the London College of Fashion, explains

that the expression spread in the mid-2000s when the first brands designed by stylists "with religious motivations" were born. The Internet had a positive impact on spreading this phenomenon and allowed Muslims to benefit from modest fashion that was previously missing (Lewis, 2013). The market is expected to reach \$ 373 billion by 2022, compared with \$ 254 billion in 2016, according to State of the Global Islamic Economy 2017-2018. In this market the UAE ranks first, followed by Turkey, while Italy in third place as well France and China are in fifth and sixth place, while Morocco ranks tenth as countries have the best developed Islamic economy for Fashion (State of the Global Islamic Economy, 2017). Italy is the fourth in Europe for Muslim inhabitants: about 2.8 million people, equal to 4.8% of the total in 2016, the number will become about 7 million people, equal to 12.4% of the total in 2050 (Pew Research Center, 2017).

Muslims cannot be seen as a single or similar fashion market. Every part of the Islamic world has its own culture and consumer behaviour, the forms and wear of clothes are varied according to the population, customs and traditions that play a prominent role in addition to the ruling regimes (Shuayto, 2010). Every country with an Islamic majority goes to merge its own style of Shariah into its legal system according to its political system (Muhamad Hashim & Mizerski, 2010). It is recalled that modest fashion does not necessarily coincide with the clothing choices of all Muslim women, and in the Islamic world a great debate is underway precisely on the way women dress and in particular on the veil, there are some Islamic countries that apply Shariah in all aspects of life. For example, Saudi Arabia and Iran are two Islamic states that adopt the obligatory Islamic clothing policy where the (Hijab) is compulsory for all women, including non-Muslim and foreign women visiting the country (Milani, 1992),(The Economist, 2015), some countries with an Islamic majority has prevented the Islamic clothing for women in public places like Tunisia (Saleh, 2006), but most of the other countries consider this a matter of personal freedom. As for non-Islamic countries, wearing Islamic clothing for women in public places varies according to the culture, law and policies of each country (Pew Research Center, 2016). In Italy, for example, the prohibition of wearing the Islamic clothes in public is not so much the *hijab* (headscarves) but rather the *burqa* (which covers the face and the body integrally) and the *niqab* (which leaves only the eyes visible)(Byng, 2010), since, for the Italian law for example, in public and for any eventuality it must be possible to recognize the person(BBC News, 2018; Repubblica Italiana, 1975).

So the modest fashion is extremely varied, including designers with very different tastes that are intertwined with those of the countries to which it is addressed, from North Africa to Asia, from the United States to European countries. In the West there is an often stereotyped vision of Muslim women, repressed and covered by dark clothes from head to toe: it is a realistic but often partial representation (Macdonald, 2006), which does not take into account the many who want to feel beautiful and fashionable while respecting the rules of "halal" or "modest" clothing, which includes non-adherent and non-transparent clothes that cover most of the body (Boulanouar, 2006).

2.3 The Institutional Theory

The utilization of institutional theory as a theoretical framework has been growing in the last 20 years in all fields of management research. According to Scott (1995), the significance of institutions has been highlighted in the different aspects of organizational behaviour (Zucchella & Magnani, 2017). The attention centre of Institutional theory focuses on the role that political, social, and economic systems play in shaping social and organizational behaviour. With the term institutions, North defines these "humanly constraints that structure political" economic, and social interaction ... [and that] provide the incentive structure of the economy ... " (Zucker, 1991). With a general look, the application of institutional theories is

about how the environment works in interacting with other domains. According to the existing classification, three normative and cognitive groups can be mentioned. It can be said that the introduction of institutional theory, which was specifically shown by the (North, 1990), focuses on emphasizing the role of political, social and economic systems in shaping social and organizational behaviour (Scott, 2004). The institutional context includes three cognitive, normative and regulatory dimensions. This means that both formal agents (i.e., institutional laws and regulations) and formal agents (such as norms, beliefs, values, and shared knowledge or cognitive categories) must be considered at the same time (Scott, 2015). In general, the institutional theory focuses on the social structure, which includes plans, rules, norms and procedures as a framework for social behaviour and analysed (Scott, 2004). Fashion as a social phenomenon and along the lines of an innovative phenomenon has attracted widespread attention that is used within the framework of the theory of institutional theory in the branch and in the social environment to examine the system of individual interactions. The foundation of social science is based on the principle that cultural and social issues affect social behaviour. The apparent cover in Islam is very emphasized and therefore cannot be hidden from the point of view of religion and there are instructions in Islamic law. In Islamic laws and Shariah, it is said that it is worthy for a Muslim who takes religious orders in all aspects of his life. Therefore, it is obligatory for Muslims to learn the teachings of the law and follow the rules of Halal and Haram and follow what God has commanded Muslims that the kind of coverage of the personal perception the laws related to it are considered as the most important laws for the individual's life. So, fashion is closely related to the fact that they can move in the direction of one another or that they violate each other. Fashion in Islamic societies is completely tied to beliefs and norms and values and has a close relationship. Ethical aspects and Islamic moral standards are fashioned under the influence of shariah. Institutional contexts include norms, beliefs and values or cognitive categories have a direct impact on this phenomenon in Islamic societies. Because fashion is a cultural model in which these societies cannot be separated from beliefs and values. Thus, moderation regulates the individual's social and environmental behaviour according to the latest patterns. Fashion encompasses the entire range of social life. Clothing and styles are the most fashionable commodities that are controlled and directed in Islamic societies directly from Islamic values, and these are the norms that determine the course of its movement. Modest fashion establishes a camp to illustrate cultural differences (Manev & Stevenson, 2001) and cultural distance between societies.

3. Methodology

This paper uses a qualitative research approach that focuses on describing and understanding phenomena (Patton, 1990). The nature of the analysis is based on the use of the case study method, which examines all aspects of a given situation and collects in-depth information (Gomm, Hammersley, & Foster, 2000). It is useful in providing information that can not be obtained in other ways (Rowley, 2002). The case study methodology is appropriate for use when the focus of research is on a contemporary phenomenon within the context of real-life (Yin, 1994). It is also preferable to use it when there is a desire to study a case that contains many variables and factors associated with each other and when these factors and variables can be observed (Fidel, 1984). The case study approach is therefore appropriate for use to achieve the research objective of examining the extent to which Islamic religion, ethical and moral standards in fashion are affected. As well as the impact of the cultural, social and regulative factors derived from the institutional theory in this sector in the Italian context. The case study is based on several basic steps. Determining the case and place of study is considered the first of these steps (Fidel, 1984), the Italian context has been chosen to be the case of the study because there are many Muslims in Italian society and it is

considered an important country in the fashion sector. Next comes the determination of the type of case study to be dealt with. Specifically, the search uses narrative descriptions (Baxter & Jack, 2008) by observing the phenomenon of research and writing down all that relates to it, where the extent to which the aspects are realized on the ground is described in the Italian context. In addition, in determining the number of cases, the information was taken from a single case study (Baxter & Jack, 2008), since the aspects to be studied are similar in the Italian context, so the single case study will be suitable for study and give the required indicators.

4. Italian Case Study

Italy has always played a central role in the fashion world. There have been some Italian designers who have established themselves in the sector and whose fruits are still gathered, names such as Giorgio Armani, Gucci, Versace, Dolce & Gabbana, Prada and Valentino (Steele, 2003). The fashion industry is a productive sector of enormous importance for the Italian economy with a turnover of 70.4 billion euros, worth 1.3% of national GDP (Mediobanca, 2017). Fashion is an essential part of Italian society and reflects the culture of the Italian people, where they are known for their good-looking interest "*La Bella Figura*" the term which expresses the good impression. Indeed, in the field of fashion, Italian excellence distinguished by the Made in Italy brand has always been recognized and admired all over the world (Paulicelli, 2014). Modest fashion is also growing strongly in Italy and has transformed itself from fragmented and artisanal into a real industry that organizes events and fashion shows, with its sites and magazines that tell the latest trends and the most beautiful collections and with a global organ that represents it: "Islamic Fashion and Design Council (IFDC)" (IFDC, 2017). Italy is the fourth in Europe for Muslim inhabitants: about 2.8 million people, equal to 4.8% of the total in 2016, the number will become about 7 million people, equal to 12.4% of the total in 2050 (Pew Research Center, 2017). This led to the birth of Italian brands and an interest in the sector both by foreign companies and by Italian fashion organizations. In Milan modest fashion officially arrived on September 24th, August 2018, during Fashion Week, when it was organized the Milan Fashion Week Modest Soirée (IFDC, 2018). On that occasion, four companies were winners: Bow Boutique from Saudi Arabia, Al Nisa Designs from the USA and Chantique from Brunei and another made in Italy modest brand, Luya Moda. The third edition of the Turin Islamic Economic Forum TIEF (after that of 2014 and 2015) took place in Turin in March 2017, designed by Prof Paolo Biancone and organized by the City of Turin, Turin Chamber of Commerce and the University of Turin. TIEF represented an international event for the city that involved delegates: local stakeholders had the opportunity to meet the most important players in finance and the economy belonging to Islamic countries operating worldwide and was addressed in all editions the theme of modest fashion and its importance in the Italian economy (TIEF, 2017). Before that, The Municipality of Turin organized on July 28, 2015, in collaboration with Thomson Reuters, Dubai Chamber and Dubai Islamic Economy Development Center the Round Table on Islamic fashion, or modest fashion. the event involved key professionals and entrepreneurs from the world of modest clothing, so this emerging sector is mainly aimed at consumers of Islamic faith, as well as Italian entrepreneurs interested in expanding their brand to that consumer segment (YouTorino, 2015). Following is back the Turin Fashion Week in 2017 with an even more international cut compared to the previous edition, to characterize the event was, in fact, the Modest Fashion composed of 31 designers, most of them women. Among the guests of this edition the prestigious Islamic Fashion and Design Council that marched during 3 days and saw the participation of Alia Khan, President of the Islamic Fashion and Design Council. Also in 2018 Islamic fashion returns to the forefront of the Turin Fashion Week fashion shows. On the catwalk designers from the countries of Asia

and the Middle East and also from the United States (Torino Fashion Week, 2018). One of the lines of modest fashion that has had more resonance in Italy is the one signed by Dolce & Gabbana, which in 2016 launched its first Abaya collection officially dedicated to Muslim women. Abaya included looks with a focus on hijab (the veil to cover the head) and abaya (a garment, usually black, that covers the whole body except the face, feet and hands) without forgetting the accessories. While for the tunics the chosen colours are sober and neutral. this initiative did not only talk about style, lines and fabrics, but also about culture and religion (CNN, 2016).

The status of the annual Global Economy Report of 2017 for modest fashion indicators which assesses the health of countries and the development of their ecosystem in this sector. This indicator is part of the aggregate Global Islamic Economy (GIE) indicator which includes other sectors. The indicator relies on three main categories to measure a level of development in the modest fashion sector of each country, these indicators are based on: the level of export of clothing to OIC (Organisation of Islamic Cooperation) countries, the rate of awareness through the institution of conferences and the publication of articles and news, social result which include clothing pricing and labor fairness indexes. In this study, Italy ranked third among 73 countries selected, and ranked fifth as the largest source of clothing for OIC countries worth \$ 1 billion while China ranked first with \$ 17.5 billion in 2016 (State of the Global Islamic Economy, 2017).

Table 1.
The top ten countries in the Modest Fashion Indicator

Modest Fashion	Sector Score	Clothing Export to OIC	Awareness Score	Social Score	GIE Ranking
United Arab Emirates	63	64	93	32	2
Turkey	37	70	13	28	16
Italy	34	19	6	77	54
Singapore	33	29	9	60	13
France	32	10	8	77	43
China	32	60	0	35	49
Malaysia	31	8	34	50	1
India	30	30	1	58	28
Sri Lanka	29	9	0	78	18
Morocco	27	4	11	67	21

Source: state of the global Islamic economy report 2017/2018

In the Italian context, Table 1 shows clear differences between Italy and non-Muslim countries such as China and India in the export of clothes to the OIC countries, although Italy is one of the most important countries in the field of fashion and has a huge infrastructure in this sector. As for the awareness, the score has received a small rate of numbers, this is due to the low proportion of conferences and research that have spoken on the subject. Conferences, seminars and research are concentrated in specific cities of Italy. Turin, for example, has taken the initiative since 2014. Despite the increase in the export of Italian clothing to the OIC countries, the domestic and foreign Islamic fashion market is still largely untapped by many Italian designers and clothing companies, due to lack of awareness of the importance of this market. For example, for many Muslim women, it is difficult to find clothes for them in Italy, they have to look for clothes abroad, on foreign websites, and often they are too exotic or traditional, they don't know their tastes, which are modern and above all are Italian tastes. Generally, Muslim women are interested in Italian elegance and fashion as much as their commitment to Islamic dress and seek to blend contemporary elegance with their religious and cultural background. Italian brands are appreciated by Muslim women, obviously, their strength lies in the care with which they are made and in the excellence of materials and

finishes, but in these brands, there are also many things to develop. In general, a more careful study of the needs of Muslim consumers is needed, which do not feel fully understood by Italian designers and brands. Designers must keep in mind that the modest fashion market is progressive and dynamic, which addresses different age groups, lifestyles and cultural diversity. Muslims cannot be viewed as a single fashion market each part of the Muslim world has its own culture and consumer behaviour and even the application of Islamic law on the way dress varies from state to state, also taking into account the Muslims in Western and Italian societies have different dress tastes imposed by cultural and social reality on the one hand and the political and legal system on the other. Hence, Religious, cultural, social and legal factors inspired by the institutional theory are an important tool for Italian designers to understand and study different markets and how to access them, giving a new economic opportunity to the Italian fashion sector represented by Muslim consumers.

5. Conclusion

This study has shown that the Islamic religion is comprehensive in all aspects of life by setting the rules stipulated by the Shariah to regulate the social and economic aspects in particular and explained the relationship between fashion and Islamic religion and how the Islamic faith confirmed the modesty in dress and how the cultures and regulations of each society play a prominent role in determining the method of dress. Islamic fashion has shifted from a religious issue to a huge economic market and has prompted fashion designers to pay attention to Islamic traditions and culture. Many international fashion houses have begun to incorporate Islamic elements into their collections due to a large consumer market. In this study, the institutional theory was taken in consideration to identify all the factors that affect the modest fashion to study this subject in a scientific and in-depth manner because the Islamic religion is spread all over the world and has mixed with the shariah laws many other factors as the cultures and the regulations for every society that influence the manner of the dress too and this gives us an integrated vision to understand the needs of Muslims in this market from one society to another. The study applied the case study method taking into consideration the Italian context for the following reasons: the spread of the Muslim community in this country and the needs of modest clothing and the importance of Italy in the world of fashion and thus will has a pivotal role in many Muslim countries to provide their needs in the modest fashion sector, especially after remarkable attention to the made in Italy in many countries of the world. The results showed that modest fashion is growing in Italy with the increase in the preparation of Muslims and the development of trade relations between Italy and Islamic countries, many organizations have led to the establishment of conferences and seminars on the modest fashion in addition to the interest of some Italian fashion companies in the production of clothing suited Muslims needs. Despite this interest, the theme of modest fashion is still not sufficiently exploited by companies and the difficulty of finding clothes matches Italian tastes and fashion for Muslim women. Italy can play a pivotal role in the modest fashion sector by enjoying the highest levels of quality in materials and manufacturing and due to Italy's international reputation in the fashion sector, therefore, modest fashion must be seen as a business opportunity for Italy and take in consideration the religious, cultural, social and legal factors derived from institutional theory to better understand the dynamics and requirements of the market in Italy and around the world.

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