

Local rooting and creativity within the fashion industry in Beirut

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Abstract

Purpose – The purpose of this paper is to analyze the factors that make Beirut a fashion hub by studying the characteristics of creativity and the role of the different stakeholders in setting an environment that encourages creativity in Beirut.

Design/methodology/approach – The methodology of this research is based on a literature review and information collected through semi-structured interviews with the different stakeholders of the sector.

Findings – The research reveals three results. First, this dynamic fashion design in Beirut is explained by the international success of some Lebanese fashion designers. Second, as there is an absence of any form of governmental intervention, the development of the sector is totally based on private business initiatives. Third, the research demonstrates the importance of the local culture, knowledge exchanges and lifestyle in shaping creativity and designers' careers in Beirut.

Originality/value – These findings contribute to the clarification and critical analysis of the current state of fashion design in Beirut, which would have several policy implications.

Keywords Lebanon, Fashion design, Creative economy, Creativity, Local culture, Beirut

Paper type Research paper

1. Introduction: local factors of creativity and competitiveness in the fashion industry

This paper deals with the geographical aspects of the fashion industry in Beirut, the Lebanese's capital, and shows the importance of the local culture, knowledge exchanges and lifestyle in shaping business and designers' careers in Beirut, through creativity, as well as in explaining the international success of a certain number of designers.

The fashion retail market is significant in size, with estimates valuing the global industry to be worth over \$1.3 trillion, representing over 1.7 percent of global GDP in 2013 (DDFC, 2016). In recent years, the geography of the fashion industry has faced many changes due to the different requirements of customers and the variations of global economic environment, with the rise of digital services, such as e-commerce and social media (Hracs *et al.*, 2013), but also with the emergence of new fashion spaces. Despite the "big 4" of New York, London, Milan and Paris (Breward and Gilbert, 2006), the globalization of fashion design opens up new opportunities for new places, what some call second or third-tier cities in the fashion sector (Brydges and Hracs, 2018). Indeed, according to the Business of Fashion and McKinsey Institute (2016), between 2015 and 2025, the majority of the top 10 fastest-growing fashion cities are in emerging market nations, including Shanghai, Chongqing, Shenzhen, Mexico City and Delhi, where the retail and apparel markets have been in an upward swing. Emerging markets will account for a larger market share and stronger market growth rates in this segment over the next ten years, with China playing an



increasingly important role (DDFC, 2016). According to Business of Fashion and McKinsey Institute (2019), China is expected to overtake the USA as the largest fashion market in the world in 2019. In addition, India becomes a focal point for the fashion industry as its middleclass consumer base grows and manufacturing sector strengthens.

In the Middle East and North Africa (MENA) region, creative industries have played a prominent role in the cultural and economic development of the region for centuries (art, calligraphy, music, etc.). In 2014, the MENA fashion retail market is estimated \$75bn – in terms of retail sales. The United Arab Emirates leads the region with 28.3 percent of apparel revenues. In terms of growth, the MENA fashion market has outpaced global industry growth by over 4.7 times since 2010, with a CAGR of 15.7 percent vs a global CAGR of 3.3 percent. However, there are a number of challenges and barriers that remain within the MENA region: the lack of design institutions, the poor enforcement of Intellectual Property protection, the lack of educational facilities and regional talents, and the lack of production facilities (DDFC, 2016).

Lebanon is a small country in the Middle East, with an estimated population of 4.65m inhabitants. Classified by the World Bank as an upper middle-income country with a GDP of \$47.1bn in 2015 (Harake *et al.*, 2016), the Lebanese economy is often described as having an open, liberal and modern outlook with minimal state intervention (Marseglia, 2004; Leenders, 2012), and mainly driven by services such as banking and tourism. One of the key issues facing Lebanon is the political instability of the country and the region, which is both internally and externally.

In 2013, according to a study by BankMed (2013), the Lebanese fashion industry increased by an average annual growth rate of 3.9 percent, reaching \$606mn (in terms of spending). The demand for fashion in Lebanon mainly leads to imports, from Europe in particular, as the local production capacity does not meet the local demand.

Currently, Beirut leads the fashion design in the MENA region, with a number of successful luxury labels launched by Lebanese designers. In fact, Beirut is a well-known regional hub with a particularly strong reputation in fashion. Despite the present economic and political obstacles, fashion is an important industry in Beirut and our research shows that it continues to progress.

However, the reasons for this success have not been fully explored and we do not know much about the present challenges. It appears that some local factors related to creativity or knowledge exchanges are important to explain business success in this industry, but this remains to be shown, and this is what we aim to do here.

The main objective of our research was to explain the business success of Beirut's local fashion designers by analyzing the factors that have contributed to make these designers and Beirut a fashion hub. In order to explain this success, we studied the fashion business's characteristics and development over the years. We analyzed the characteristics of creativity in the fashion industry and the role of the different stakeholders in Beirut. As mentioned above, our results show the importance of the local culture, knowledge exchanges and life style in shaping creativity and designers' careers in Beirut, including in explaining the international success of some of them. Before we expose the results, we present a brief literature review, and then our methodology.

2. Literature review

The starting point of our research had to do with the relationship between geography and creativity. In recent years, creativity has moved to the center of the agenda of urban development, and has given birth to a number of new concepts: creative economy, creative class, creative city, creative industries, place-making, etc. (Florida, 2002, 2005; Markusen, 2006; Pancholi *et al.*, 2015). The creative economy refers to a set of creative and cultural activities such as advertising, architecture, design, fashion, crafts, filming, music, publishing and arts (Chaston and Sadler Smith, 2012).

The literature on the geography of the creative industries has widely demonstrated that those activities often concentrate in specific cities and metropolitan areas that provide a particularly fertile environment for producers and for consumers of creative goods and services (Landry, 2000; Scott, 2000, 2006). Those spaces play a crucial role in the growth of the creative economy (Florida and Gertler, 2003; Scott, 2006). A number of different approaches have attempted to explore the non-market factors that make some places or cities more attractive to creative workers or to the “creative class.”

The first approach addresses the cultural and social characteristics of those cities. Florida (2002) indicated that coolness, tolerance, talent and diversity, are significant assets in attracting creative people and capitals. Cultural and ethnic diversity is seen to have a positive impact on creativity (Audretsch *et al.*, 2010). For Storper and Scott (2009), the accumulation of high levels of human capital in “tolerant” or open-culture regions, can be successful both in terms of attracting the creative class and for assimilating recent immigrants. Certain urban districts function as contexts for the production of symbolic meanings and could encourage the collective process of cultural production (Hauge and Hrac, 2010).

The second approach analyzes the role that quality of life plays in attracting talent to cities, and examines the role of cultural or service amenities. Some urban scholars and economic geographers underline the role of entertainment and lifestyle in cities, indicating it can act as a magnet in attracting human capital and business (Bocock, 1992; Clark and Lloyd, 2000). This might be more important in creative or cultural sectors, as it might prove successful in turning creativity into commercially exploitable knowledge. Piergiovanni *et al.* (2012) show that the presence of a rich variety of amenities, which make life pleasant, attracts more educated, talented and creative workers who, in turn, contribute significantly to the growth of the city or the region. According to Scott (2010), urban milieus have many aspects that can affect creativity and attract creative workers such as a system of leisure opportunities and amenities that provide relevant forms of recreation and distraction.

Third, the local environment can be a source of information and knowledge through the different networks found locally. The creation process appears as the fruit of a collective action, which leads the creator to activate numerous networks of affinities, to multiply contacts and relations of cooperation, and to diffuse his work toward various groups (Becker, 2006). In fact, creativity is now widely acknowledged to be a social process (Rantisi and Leslie, 2015), where new ideas are generated through interactions, exchanges and observations of the various actors of creativity (Grandadam *et al.*, 2013). The greater the environmental uncertainty, the more likely that entrepreneurs rely on social relations for acquiring a competitive advantage (Peng and Luo, 2000).

Growing emphasis on its “design-intensive” nature and its high brand visibility in the public sphere has led the fashion industry to be considered, in both academic and policy circles, as a key component of the creative economy (Evans and Smith, 2006; Business of Fashion and McKinsey Institute, 2016). According to a study by the World Intellectual Property Organization, in 2014 for the textiles, apparel and leather products, including fashion, 29.9 percent of the value of manufactured products sold around the world comes from “intangible capital,” such as branding, design, and technology (WIPO, 2017).

Nevertheless, fashion is a volatile market and fashion requires constant change (Khan, 2003). Ephemerality, ambivalence and ambiguity make fashion design a highly uncertain and risky business (Tremblay, 2012; Yagoubi and Tremblay, 2016). As a matter of fact, the notion of risk is omnipresent in fashion design (Yagoubi and Tremblay, 2016). However, the network and intermediary organizations’ support can be seen as a risk reduction factor (Lupton, 1999; Klein *et al.*, 2007; Tremblay and Yagoubi, 2014). Rantisi and Leslie (2010) demonstrate that the public spaces and the neighborhood in which fashion designers locate are important to them as this can have an impact on the chance encounters and interactions between creative workers, which can also be a source of cooperation and risk reduction. For example, Hauge and Hrac (2010)

demonstrated that, in Toronto, the growing prevalence of independent production is making the long-standing connections between musicians and fashion designers more crucial to their success. Fashion designers are using musicians to promote their brands and clothing lines and musicians are getting fashion designers to enhance the visual components of their stylistic portfolios. Rieple *et al.* (2015) demonstrated that, even in a world in which ideas are accessible globally via the internet, location and proximal resources are important to a significant subset of fashion design firms in the UK. Tremblay (2012) shows that fashion designers in Montreal appreciate some support from intermediary support organizations or government programs and those sources of information and knowledge helps them develop their career and business. The support from intermediary organizations is also shown to be important in the work by Yagoubi and Tremblay (2016). Also, He (2013) demonstrates that social capital embedded in Guanxi (Traditional Chinese networks) is a valuable and unique resource that gives creative entrepreneurs advantages for successful venture creation. Moreover, from an entrepreneurship standpoint, policy interventions, including incubator and workspace initiatives, financing opportunities, creative clusters and hubs, as well as skills training and business support, play an important role in the production of creative spaces (Foord, 2009).

Despite the importance of fashion design in Beirut, considered one of the main fashion hubs in the MENA region, there are very few studies about the geographical aspects of this industry and its links to culture and locally based resources. Most of the existing studies are reports from international or local organizations, which focus on some aspects of the fashion industry. For example, the ESCWA (2003) report focuses on the productivity and competitiveness of small- and medium-sized enterprises (SMEs) in the apparel-manufacturing sector in Lebanon. The report of the American University of Beirut. (2007) entitled “Mapping the creative industries,” analyzed the characteristics of the main creative industries in Lebanon. It sheds light on the characteristics of these sectors, their structure and specific dynamics and inter-relationships with other sectors/industries. However, the report did not analyze the dynamics of creativity in the fashion industry. In addition, its results are somewhat out of date, especially with the new challenges facing the fashion industry: e-commerce, social media, etc. The study of Hill (2008) also offers a general overview of the creative sectors in Lebanon and presents recommendation on how to improve the state of those sectors. The report of Endeavor Lebanon (2015) offers an interesting analysis of the dynamics of entrepreneurship within the fashion sector in Lebanon. The report concludes that Lebanon’s fashion design ecosystem has strengths and weaknesses, which sometimes depend on the subsector: couture, ready-to-wear or accessories. Strengths include talent and strong cultural support while weaknesses relate to failures in the supply chain, difficulty accessing local and foreign markets, scarcity of support organizations and lack of funding. We notice here the absence of any scientific study on the geographical aspects of the fashion industry in Beirut. Given these elements, we sought to fill this gap by analyzing the geographical aspects of the fashion industry in Beirut. We show the importance of the local culture, knowledge exchanges and lifestyle in shaping business, and designers’ careers in Beirut, through creativity, as well as in explaining the international success of a certain number of designers.

3. Methodology

The methodology of this research is based on a literature review and information collected through semi-structured interviews. After the literature review on theoretical dimensions, presented above, the empirical research started with a literature review on the Lebanese fashion industry, with written documents, governmental reports, websites, newspapers, etc. This step gave us a general overview of the fashion industry in Beirut, in order to determine the most important stakeholders and the characteristics of this industry.

The second step was a qualitative investigation on the basis of two semi-structured questionnaires that included two rounds of interviews, conducted during the months of

July and August 2016. The first series of interviews were done with ten experts from organizations involved in the fashion sector, such as Lebanon for Entrepreneurs, Creative Space Beirut (CSB), Starch Foundation, ESMOD and The Investment Development Authority of Lebanon (IDAL). The average length of the interviews was 1 h 08 min. The questions (Questionnaire 1) covered four areas:

- (1) General information about the organization: programs and services, role in the development of the industry, etc.
- (2) Dynamics of the local network: the network of partners, role in the network, the key leaders of the network, the level and type of relationships and interactions, barriers, challenges, limits, results, etc.
- (3) The government policies and regulations: the relationship with governmental actors: the nature of relationships, the degree of government involvement in the development of the industry, etc.
- (4) Challenges of the fashion industry in Lebanon: strengths, weaknesses, opportunities, threats, etc.

The second series of interviews were held with 15 fashion designers located in Beirut. The average length of the interviews was 1 h 20 min. For our study, we focused on two aspects of the fashion industry: the design of women's wear and ready-to-wear. It needs to be mentioned that here that there are no official statistics on the number of fashion houses in Beirut. Furthermore, as mentioned by the American University of Beirut (2007) report, there is no organization that collects statistics on the Lebanese fashion industry.

The 15 designers were randomly selected based on three criteria: the size of the company, the level of maturity of the designer career (early career or established designers) and the location within the different neighborhoods of the Beirut. We established a list of 20 potential interviewees based on the list provided by the Endeavor (2015) report, trying to get some diversity but also a certain representativity, although this cannot be totally ensured in a qualitative process such as ours. We then contacted these persons by phone and asked for interviews. Most designers accepted and we had few refusals (five refusals). The questions (Questionnaire 2) covered six areas:

- (1) Basic information about the company and the designer: history, evolution, career, activities, etc.
- (2) Production: product development, strategic positioning, markets, etc.
- (3) Dynamics of creativity: local culture, quality of life, etc.
- (4) Dynamics of the local network: the network of partners, role in the network, the key leaders of the network, the level and type of relationships and interactions, barriers, challenges, limits, results, etc.
- (5) The government policies and regulations: the relationship with governmental actors: the nature of relationships, the degree of government involvement in the development of the industry, etc.
- (6) Challenges of the fashion industry in Lebanon: strengths, weaknesses, opportunities, threats, etc.

Our analysis began with the processing of the data. To facilitate the processing of information collected, we transcribed the interviews. Subsequently, we conducted a content analysis of interviews, and finally, we classified the information and elements of the interviews, using an analytical framework that incorporated the main research themes (Table I).

Table I.
The analysis grid

Themes	Subthemes
Linkages between actors	Nature of the relation Local network
Governance	International network Key leaders of the industry Role of associations Role of public actors
Creativity	Resources and knowledge Local culture Quality of life
Entrepreneurship	Resources and knowledge Efficiency Challenges

4. Results: the strength of fashion design in Beirut

At the moment, Beirut leads the fashion design sector in the MENA region, with a number of successful luxury labels launched by Lebanese designers. In fact, Beirut is a well-known regional hub with a particularly strong reputation for the production of haute couture dresses and wedding dresses. Beirut is frequently designated as the “fashion capital” of the Middle East. This recognition seems to be expanding, particularly in response to shopping visits to Beirut by customers from the Gulf countries; also, the international reputation of many Lebanese haute couture designers is reinforcing the trend (ESCWA, 2003). According to our interviews, while the fashion industry in Beirut is not clearly supported by the State, it does benefit from a certain number of advantages, which we will present in the following pages: the local culture and quality of life, the dynamics of other related sectors such as tourism, and also the leadership or “engine” role of the international and regional success of some Lebanese fashion designers.

4.1 Culture and quality of life

When we asked the fashion designers why they choose Beirut to locate their business, most of them mentioned the fact that Lebanon is their home country and they do not really have other options. This may appear somewhat blunt, but other factors are important in explaining fashion designers’ success in this city. Indeed, other reasons were mentioned such as freedom (in comparison with the rest of the Middle East region), the culture, the diversity and the general quality of life. Unlike many other Middle East countries, Lebanon is an open and pluralistic society. Lebanon has long been considered one of the most cosmopolitan and progressive countries in the region. This openness is believed to have fostered creativity in various domains such as fashion (Endeavor Lebanon, 2015).

First, our interviews indicate that Lebanese fashion is shaped by the country’s characteristics, in particular, its cultural diversity. The cultural heritage of Lebanon is a historical melting pot of multiple civilizations and cultures: from the Phoenicians, Greeks, Romans, Islam, the Crusaders, Ottoman Turks to the French (Plourde Khoury and Khoury, 2009). “Their remnants are still clearly visible today not just in the ruins and tourist sites, but in the culinary style, the language, architecture, folklore and crafts, fashion, literature and performing arts of the country” (American University of Beirut, 2007, p. 5):

I lived all my life here so I know Beirut very, very well. I really like the fact that we can work with craftsmen so it’s handmade, very old techniques that can be reworked in a modern way. In addition, I make jewels sometimes, objects, it can be something portable or not. So it’s rather a studio of experimentation. Therefore, I like that I can work with the guy that makes fiber glass or the carpenter or, you see the encrusted pearl that we can see in the traditional Lebanese furniture. So I think it’s very interesting to take this very old know-how and put it in a more modern context.

I work for example with women doing Palestinian embroidery in Palestinian camps. (Fashion designer No. 7, Questionnaire 2, Interview, 2016)

The modern culture of Lebanon was mainly influenced by the French mandate (1923–1946). Quickly, it became a hub for business, culture and fashion. There was a need for the Lebanese people to mix tradition and a “French style” of dress (Sharif, 2017). Consequently, fashion design in Beirut started with talented tailors who imported haute couture models from French fashion houses and executed them locally (Endeavor Lebanon, 2015). During the “Golden Age” period (1950–1975), Beirut flourished as a trading hub with a tolerant multicultural and multilingual society (Hill, 2008). Beirut was designated as the “Paris of the Middle East,” “With its French Mandate architecture, its world-class cuisine, it’s fashionable and liberated women, its multitude of churches on the Christian side of town, and its thousand-year-old ties to France, it fit the part” (Totten, 2013). During this period, a rising number of designers/tailors were hired by bourgeois families to design custom-made dresses. During the civil war (1975–1990), many designers moved their workshops outside Lebanon. After the civil war, tailors started developing their individual and original designs.

Second, all the persons we interviewed said that Lebanese people are a sort of a mix between Arab people and western society. In fact, Lebanon is an open, pluralistic society with 18 different religious groups and a parliament split equally between Christians and Muslims. Lebanon’s historically fragmented culture is the substance of “what Lebanese design is, because that is what the whole country is” (Schellen, 2017). Indeed, Lebanese designers are considered as trendsetters of regional fashion, and the country is traditionally a major shopping destination for visitors from the Middle East (Endeavor Lebanon, 2015). Furthermore, the Lebanese culture can be designated as “fashion-friendly.” In general, Lebanese people are very interested in fashion and appearance. For them, image and appearance are really important and therefore they are very aware of their physical appearance (Daoud and Högfeldt, 2012). They love designer clothes and care about their appearance and the impression they make. In fact, Lebanese are well-known for their elegance – even men are well-groomed and well-dressed (Global Affairs Canada, 2017). The average Lebanese are very proud of their appearance, very conscious of their image, which they so rightfully earned (BloomInvest Bank, 2013).

Third, a recurrent description of Beirut mentioned in interviews is a “mix of freedom and chaos.” Beirut is often described as a space full of paradoxes, reactions and contradictions (Harb, 2014). The contrast between the two images of Beirut – the worldly one and the disorderly one, led fashion designers to develop their relationships with Beirut through different forms of interaction that affect the city’s image and its artistic presentation. This process is for many designers a source of inspiration and creativity. One of the designers provides a good overview of Beirut as a source of inspiration:

Living in Beirut day-to-day is inspiring, because of the chaos but it’s like fun, beautiful city where I like partying but then you have a disaster. It’s kind of an inspiration because your mind goes crazy. Which is what happens when you’re getting inspired and you want to create something, you have days where you’re up, you have days where you’re down. Because when the city disappoints me, I really want to have fun, to explode, and when I’m happy, I want to show how much I like Beirut. What is exactly is inspiring about Beirut? I think it’s the city itself with the people, the streets, the buildings, etc. even if Beirut, sometimes, it can be very boring, and embarrassing, it always remains my source of inspiration. (Fashion designer No. 4, Questionnaire 2, Interview, 2016)

Most of the fashion designers are related to Beirut and its “chill” and “Bohemian” side. Asked about the possibility to move to Dubai, (the other fashion capital in the region) a well-known fashion designer answered:

I’m still more of a Beirut person, this lifestyle. I love visiting Dubai. However, I can’t see myself living there because I’m more of a chill person. Dubai is just too much for me. Beirut is a very chill city. In Beirut, you can do whatever you want. You can decide to just get out and meet friends for a

drink in any bar. In Dubai, people like to show off and when they want to party they want to get dressed from head-to-toe and I'm not this kind of person at all. I go out just to really have fun, not to show off. (Fashion designer No. 1. Questionnaire 2, Interview, 2016)

Fourth, another interesting dimension of the fashion industry in Beirut, according to our interviewees, is the role played by material factors, such as historic buildings, mixed-use zoning, and public space, in nurturing and supporting creativity in some specific neighborhoods in Beirut. In our research, we studied the locations chosen by the fashion designers in Beirut. As we mentioned above there are no official statistics on the number of fashion houses in Lebanon, nor is there any organization that collects statistics on the Lebanese fashion industry. Our sample was based on the list provided by the Endeavor (2015) report. In total, we had a list of 36 fashion designers that we succeeded in locating as showed in the table below. We noticed that the two main locations for fashion designers are Achrafieh and Mar Mikhael, both located in the inner city (Table II).

The neighborhood of Achrafieh is located in the eastern part of Beirut and it is a dense neighborhood. Today, Achrafieh is a prime location for banks, business, restaurants, etc. (El-Achkar, 2011). With its historic building, restaurants, cafés and its central location, Achrafieh, is considered one of the main fashion designer's hubs in Beirut, as mentioned by one of the respondents: "My family is from Achrafieh. So, when I started my business, I took our apartment and I transformed it into my atelier. Actually, I like it here, the neighborhood is vibrant, young, etc. It's easy for my clients to come here" (Fashion designer No. 7, Questionnaire 2, Interview, 2016).

The second neighborhood is Mar Mikhael. Since 1990, Mar Mikhael has seen a commercial transformation. Attracted by the architectural typology of local buildings, several arts, crafts and design industries settled in the area. Simultaneously, Mar Mikhael became a spillover basin for nightlife and the "hip" place-to-be, targeting a specific clientele that appreciates "authenticity" and the proximity of art and design (Krijnen, 2016). "The area has a bohemian character defined by its numerous art galleries and small locally owned bars. While you walk, you cross old and big staircases, a rare site in Beirut" (Harb, 2014, p. 22). Asked about the reasons why he is located in Mar Mikhael, a fashion designer mentions: "Why Mar Mikhael? I love it here. Its mixture of ancient shops and new businesses and it's so cool. Don't miss the narrow streets around, where you can visit some nice spots. It is a nice area packed with great restaurants and cafés. At night there are nice clubs to have a drink and enjoy good music" (Fashion designer No. 3, Questionnaire 2, Interview, 2016).

However, since the end of the civil war, Beirut has faced an urban transformation with a strong gentrification movement. Several of its neighborhoods, such as Achrafieh and Mar Mikhael, are experiencing numerous upscale real-estate developments coupled with a change in the resident population (El-Achkar, 2011; Krijnen, 2016). As a result, "The cost of space,

Neighborhood	Number of fashion designers
Achrafieh	12
Mar Mikhael	6
Sin El Fil	4
Hamra	3
Beirut central district	3
Gemmayzeh	2
Marina Dbai	2
Saifi Village	2
Jdeidet El Metn	1
Kaslik	1
Total	36

Table II.
Location of some fashion designers within the neighborhoods of Beirut

particularly in creative hotspots such as Mar Michael and Ashrafia, has increased dramatically in the last few years, so creative start-ups are now competing against more established businesses for centrally located retail premises” (Thelwall, 2012).

4.2 *Tourism and fashion*

Another source of business activity is the tourism industry. Indeed, tourism has long been one of Lebanon’s leading economic sectors. The World Travel and Tourism Council’s latest report ranked Lebanon 36th worldwide in terms of travel and tourism’s total contribution to GDP, which maintained its level at 19.4 percent in 2016, around \$9.2bn (The Investment Development Authority of Lebanon, 2014). Tourists in Lebanon spend on average \$3,000 per visit, one of the highest averages in the world. Arab tourists account for the highest share of tourists coming to Lebanon, reaching 458,069 visitors and representing 33.5 percent of the total number of tourists in 2012 (The Investment Development Authority of Lebanon, 2014).

The Lebanese domestic market is small and tourism is a booster for the fashion industry in Beirut. In fact, tourists are the main consumers of recreational and cultural services as well as a variety of creative products such as crafts and music. In fashion design, the majority of clients are from the region. The Gulf market is the most important market and is the key market of the Lebanese haute couture (around 40 percent of the haute couture exports). They provide great opportunities for local designers. The strong spending power of these clients makes this group of women among the few in the world who can afford to exclusively buy from the haute couture designers. Approximately one-third of the global haute couture clientele stems from the Middle East (DDFC, 2016). However, with the decrease in oil prices and political turmoil, the Gulf has been witnessing and this purchasing power has decreased significantly (Rahhal, 2017). Most of the Lebanese fashion designers try to take advantage of this market. For our sample, the average percentage of exports to the Gulf region is approximately 60 percent and only 30 percent for the Lebanese market (Table III):

I work a lot more for the Gulf, that’s for sure. I would say, maybe 80%, it’s for the Gulf countries, so it’s for Qatar, it’s for Kuwait. being in Beirut makes things easier. I can meet with people from Dubai or from Qatar, we can meet in Beirut, during their vacations here, it’s so easy for them, so [...] And I go to Dubai from time to time, if someone can’t come to Beirut, I meet them in Dubai, it’s easier for everyone. (Fashion designer No. 1, Questionnaire 2, Interview, 2016)

4.3 *The main fashion designers*

Another important variable in explaining the success of the fashion sector as a whole is the presence of a few “stars” in the fashion design ecosystem. Indeed, when it comes to fashion design, names like Elie Saab, Zuhair Murad, Georges Chakra, Rabih Kayrouz and Abed Mahfouz are internationally acclaimed fashion designers and role models for the young generation, who through their international fame saw fashion design as a viable and prestigious career path (Rahhal, 2017). In fact, as mentioned by Endeavor Lebanon (2015, p. 16)

Market	Sales percentage
Lebanon	30
Gulf	60
Other international markets (Europe, USA, etc.)	10

Table III.
Respondents’
presence in markets

Source: Our interviews (2016)

“Inspiration is a key aspect of prosperous entrepreneurial ecosystems. Success stories inspire would-be entrepreneurs and drive their ambition to get to the top.”

Those prominent Lebanese fashion designers have made their mark on the international scene. They hosted fashion shows in the top fashion capitals of the world and dressed many celebrities worldwide (Endeavor Lebanon, 2015). In our interviews, Elie Saab is the most frequently cited local entrepreneur to have inspired the younger generation. Also, the fashion designers that we met have repeatedly highlighted how inspirational it was to see a local designer with international recognition and a global brand, as confirmed by one of them: “Elie Saab, I take him as a model, because he is a success story and because he made it. He’s now an international designer, he’s all over the place, and we’re very proud in Beirut of having him on the map” (Fashion designer No. 6, Questionnaire 2, Interview, 2016).

Also, as one of the fashion designers notes, Elie Saab offers learning opportunities for young designers mostly through offering them internship and access to important knowledge on the sector and the dynamics of a career in fashion:

I did an internship and then I continued working for a long time at Elie Saab. Elie Saab, it was a very interesting experience for me because it’s a very large company, which is complete, from that time, in 2006, with ready-to-wear, sewing, etc. There was a fairly high customer service too so I really had the opportunity to discover the world of fashion, in all its small details I also had the chance to go to all of Elie Saab’s workshops, I worked live with the clients, I worked live with Elie, and I also worked in the studio. (Fashion designer No. 4, Questionnaire 2, Interview, 2016).

4.4 *Social networks*

All the respondents strongly insisted that their personal and professional networks influenced their business success. Most of the persons that we met mentioned the critical importance of relationships and networks to do business in Beirut. In fact, a recurrent advantage of Beirut mentioned in interviews is the social capital and the availability of contacts, which offers access to knowledge. For most of the designers, the fact that Lebanon is a “small country” made things “easier” for them, in particular regarding setting up their company, contacting suppliers and having access to tailors. Personal networks and personal social capital through family and friends and close acquaintances have provided financial support and moral-support, as mentioned above and also contributed to access to knowledge and to establish a client base. Social capital is important, particularly for young emerging designers. Indeed a strong social network for knowledge-sharing often helps them in their start-up period:

Also, another benefit is that the market is small here in Beirut. It’s a very small community so we all know each other. So, through friends and family, you are immediately recognized, especially if you do something different, something new, people recognize you right away. So they recognize your work, your talent, and that opens up a lot of doors in the market here. So that’s really important, speaking of a very local side. (Fashion designer No. 4, Questionnaire 2, Interview, 2016)

5. **Main challenges in the Beirut fashion industry**

While many fashion designers have been successful, as mentioned above, it remains that many challenges make it difficult for the fashion industry to progress in Beirut. First and foremost, many actors indicate the lack of sufficient government support. While this is not always necessary, it can clearly be useful as many international cases have shown for Europe or North America (Yagoubi and Tremblay, 2016).

5.1 *Government and fashion*

Unlike in other countries, there is little institutional support for fashion designers in Beirut and for the creative sectors in general. The majority of the persons interviewed highlighted the problem of the absence of a clearly stated and government endorsed national strategy

for creativity in Beirut. Most of the fashion designers that we met repeat that “the Lebanese Government has other priorities.”

In fact, the Lebanese economy is often described as open, liberal and modern outlook with minimal state intervention (Leenders, 2012; Marseglia, 2004). This has been considered as an advantage since the private sector has been the driving force behind Lebanon’s economic development (Ahmed and Julian, 2012).

The Lebanese Government is hindered by two main issues. First, over the last 30 years, Lebanon has been considered a fragile country that has faced many internal and external shocks: civil war, war of 2006, the Syrian civil war since 2011, a series of events that weakened the government (Raphaeli, 2009, p. 124).

Second, the Lebanese society is organized along sectarian lines of 18 recognized religious communities that each have their own political leaders and social institutions. Accordingly, citizens have historically depended on sectarian leaders more than on any national government (Welsh and Raven, 2006).

Hindered by those issues, the Lebanese state has a relatively weak capacity. The post-civil war Lebanese state has been able to accomplish little in the way of rebuilding public services or dealing with socio-economic problems (Nagel and Staeheli, 2016). The public actions in favor of creativity have thus been very timidly developed. In fact, for the government, the creative sectors and especially fashion design are successful sectors and they do not need government support, as mentioned by one of the government officers interviewed:

Fashion is a very strong sector in Lebanon. Beirut is a big shopping destination for the Gulf countries. We have also important international fashion designers like Elie Saab or Zuhair Mourad. And we think they are making good work and good money. Our government has other priorities especially with the Syrian civil war and the refugees. Honestly, fashion design doesn’t need our help. (Organization No. 3, Questionnaire 1, Interview, 2016)

Asked if the Lebanese Government is supportive of the sector, a fashion designer answered: “I don’t think they do. The government [...] we don’t have a government, so [...] that doesn’t work with Lebanese designers” (Fashion designer No. 1, Questionnaire 2, Interview, 2016).

5.2 Access to finance

Access to finance is another challenging issue for many fashion designers in Beirut. Most respondents have relied on their own funds or their families’ resources. As a matter of fact, Lebanese entrepreneurs rely on family members to establish, develop and grow their enterprises (Fahed-Sreih *et al.*, 2010). Most of the sector is supported only by personal funds:

To be able to exist in fashion, firstly, it’s not easy. You need a lot of money to have a team, to be able to have the equipment, a workshop, to be able to sell enough, to be able to survive. It’s very difficult to exist, so when the designer takes his diploma, there are several directions in which the creator goes. There will be many obstacles. But it depends on the strength of this person. He should rely on his own financing and resources. For me, without my parents, I would not be here at all. They helped me emerge, get started, etc. (Fashion designer No. 4, Questionnaire 2, Interview, 2016)

We mentioned here that some financing funds exist in Beirut such as Kafalat, but most of the respondents consider that this fund is not made for their type of business. Kafalat is a Lebanese financial company with a public concern that assists SMEs to access commercial bank funding. Kafalat helps SMEs by providing loan guarantees based on business plans/feasibility studies that show the viability of the proposed business activity. But Kafalat targets mostly SMEs and innovative startups that belong to one of the following economic sectors: industry, agriculture, tourism, traditional crafts and high technology, and there are no specific funds for the creative sectors or for the fashion industry. In addition, “The focus of Venture Capital-based approaches is necessarily on high growth businesses, so with the

exception of games and media it would seem that there are relatively few of these in the Lebanese creative sector” (Thelwall, 2012).

5.3 *Absence of trade organizations*

Another main difficulty or obstacle mentioned in the interviews is the absence of trade organization or a fashion council in Beirut which can represent the national fashion industry, organize events and promote young designers. This absence obstructs the development of the sector. The Lebanese Syndicate of Fashion Designers, while existent, seems to be dormant, with lack of activities and lack of support for young designers. In addition, the internationally acclaimed Lebanese fashion designers such as Elie Saab prefer to be member of an international federation or syndicate such as the *Fédération de la haute couture et de la Mode* of Paris, because it is more interesting for their image and prestige. Moreover, there is a lack of concerted efforts from well-known designers to promote a common cause (Endeavor Lebanon, 2015). For some designers, this can be explained by the individualistic culture in Lebanon:

The Lebanese is always very protective of what he has, he is not at all generous in what he knows, he does not want to share his knowledge, he is very jealous of someone else's success. Also, we have a high competition in the fashion design. So I think that this is also why we do not have a federation of fashion here in Lebanon. This is one of the reasons why the great creators of Lebanon have not been able to agree to create a federation. (Fashion Designer No. 4, Questionnaire 2, Interview, 2016)

This quote indicates that knowledge transfers appear to be difficult in Beirut, although fashion designers also indicate that these knowledge exchanges are crucial to develop a career, especially for the young designers, who need such access to knowledge. As indicated by Chakour (2001), Lebanese perceive Lebanon as a place where there is a high value placed on self-sufficiency, individualism and personal initiative. Because of this, the Lebanese do not generally rely on the government or any organization to provide for their well-being. Limited state capacity might be reflected in the booming social entrepreneurship (Doumit and Chaaban, 2012) and this may have contributed in developing a civil society consisting of NGOs (Nagel and Staeheli, 2016), the “NGO-ization” of the country that was often referred to in our interviews. This situation started during the civil war which was a period of proliferation of NGOs and associations in response to the weakening governmental institutions and state and the rise in international development funding (Chaaban and Seyfert, 2012).

Experts also mention the fact that the Lebanese market is too small and successful designers prefer to organize fashion shows in more international and prestigious locations. Fashion weeks are organized locally by private event planning firms or by NGOs such as Beirut Fashion Week. Also, the MENA Design Research Center initiated the Beirut Design Week, in 2012. The MENA Design Research Center is a non-profit organization based in Beirut. Founded in 2011, it remains one of the region's few institutions that focus on design as a multidisciplinary tool for social development and research. It promotes all Lebanese designers (fashion or others) by organizing workshops, talks and exhibitions for one week once a year. Some support is also offered by international organizations such as the British Council or *la Maison Méditerranéenne des Métiers de la Mode*. Other organizations that repeatedly came up in interviews are the CSB and Starch organization. In fact, the little institutional support for fashion designers and for the creative sectors in general encouraged some fashion designers to launch projects to help and support the sector. The two main projects are CSB and Starch organization.

5.4 *Creative space Beirut (CSB)*

One of the issues pointed out by some of the young designers is the high cost for fashion education in Lebanon. In fact, all the graduate and undergraduate diplomas in fashion

design existing in Lebanon are offered by private schools or universities such as ESMOD or the Lebanese American University and the fees are expensive. "From Elie Saab to Zuhair Murad and Reem Acra, it seems that expensive design schools were essential for Lebanon's renowned fashion designers" (Aboulkheir, 2015). In addition, being a Lebanese fashion designer has traditionally been restricted to those who could afford to get their education and careers started abroad, or have the networks within Lebanon to begin their hometown fashion houses with an established clientele base. A substantial percentage of the talent could be going to waste because of the lack of free design education in Lebanon (Rahhal, 2017). In an effort to break the rule and allow "underprivileged" talents to follow in the footsteps of these style giants, in 2011, Sarah Hermez, a Lebanese designer, decided to co-launch Beirut's first free fashion school with her New York-based former professor, Caroline Simonelli.

CSB describes itself on its website as "a free school in fashion design providing quality creative design education to talented individuals who lack the resources to pursue a degree at increasingly costly institutions of higher learning" (www.creativespacebeirut.com). CSB was created in order to provide highly talented but resource-limited young people of all backgrounds with the means, the knowledge and the place to grow their skills and passion for design.

5.5 Starch foundation

Starch is a non-profit organization founded by Rabih Kayrouz, an internationally renowned Lebanese fashion designer and Tala Hajjar, PR and marketing manager in various fashion and jewelry houses, in collaboration with Solidere, Lebanese corporation responsible for the reconstruction of downtown Beirut, after the end of the civil war in 1990. Starch is an incubation program that helps shape and promote the work of young emerging Lebanese designers. It is an annual program and a rotation of debut collections where four to six young designers are selected each year. The designers are guided through the process of developing their collections, as well as promoting them (communication, marketing, branding and press). These collections will then be presented for a period of one year at Starch boutique. Throughout their one-year at Starch, the designers also get the chance to participate in design-related workshops, seminars and collaborations.

Most of the designers who participated in the Starch program acknowledged that it was important for their career especially the mentoring; also, the fact that they were showcased in the Starch boutique helped them acquire marketing skills and brand recognition:

Starch was a very good experience because I realized the difference between working for a designer and working on your own. So already, the fact of existing in the market, it helped me to better understand my customers' needs, to know how to sell my product. Also, I had the chance to meet the press, the press is very important, too, especially in Lebanon. It's a very small market, so everyone knows each other. So, Starch, was really a school, as such. (Fashion designer No 7, Questionnaire 2, Interview, 2016)

6. Conclusion and limits to the research

The main objective of our research was to explain the success of the fashion sector in Beirut and analyze the factors that make Beirut a fashion hub. As shown above, various characteristics explain this success (Beirut's open and diversified culture in comparison with the rest of the Middle East, a few "stars" but also a network of designers, tourism, etc.). Also, the role of the different stakeholders in setting an environment that encourages creativity in Beirut has been shown to support the fashion ecosystem. Our research thus highlights the importance of the local culture, knowledge exchanges and life style in

shaping creativity and designers' careers in Beirut, and also in explaining the international success of a certain number of these designers.

Our research results show that the fashion industry in Beirut benefits from many advantages: the local culture, the quality of life, the dynamics of other related sectors such as tourism, including particularly knowledge exchanges with these sectors. These knowledge exchanges feed into the fashion designers' careers and constitute the "engine" role of the international and the regional success of some Lebanese fashion designers, which in turn has an impact on local and regional development (Secundo *et al.*, 2015). In fact, our interviews indicate that Lebanese fashion is largely shaped by the country and its cultural diversity. Consequently, the findings of our study confirm the importance of non-market factors, mentioned in the literature on the geography of the creative industries for the development of the fashion industry, including knowledge exchanges between individuals and firms. Furthermore, our results confirm that creativity is strongly related to local culture. Consequently, our study enhances the existing knowledge on creativity, geographic location and the fashion industry in a non-western context. In addition, in our research, we focused on the product design step, rather than on manufacturing and commercialization, which have tended to be the focus of past research in the fashion industry.

Our results also show that the future development of this industry is limited by the absence of governmental or institutional support as well as by the absence of intermediary organizations such as professional associations, trade organizations or a fashion council which could represent the national fashion industry, organize events, encourage more knowledge exchanges and promote young designers. In these difficult times (civil war in Syria, brain drain, etc.), there is a need to focus on the regeneration of Lebanon and to plan for the role it will play in the new globalized economy, especially in light of the recent emergence of the creative sectors as an important economic sector. Consequently, we recommend the creation of a fashion organization in Lebanon, chaired by a Government Minister and including the main Lebanese fashion designers. The organization would be responsible for developing a detailed action plan to support the sector, a plan focusing on the young generation of designers, creating common branding identity and opening more markets.

We need to mention a few limits of this research. The main limit is the fact that we may not have accessed all fashion designers active in Beirut and Lebanon, nor a representative sample, as this is quite difficult to attain. Amongst the interesting dimension of the fashion industry in Beirut that would require more attention is the role played by material factors, such as historic buildings, low-cost rents, mixed-use zoning and public space. These elements were put forward as contributing in nurturing and supporting creativity in some specific neighborhoods in Beirut such as Achrafieh or Mar Mikhael, but more research would be needed to show the exact role of these various factors. Finally, it would be interesting to compare the situation of fashion design in Beirut and Lebanon more systematically with that of other cities and countries, something which we hope to be able to do in future work.

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