# Creative Industries – Value Chain of Slovak Fashion Design in Bratislava Region

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## Abstract

*This paper is focused on the value chain of Slovak fashion design in the Bratislava region. The aim of the paper is to analyze the value chain of Slovak fashion designers located in the Bratislava region and to identify the main actors of this value chain.*
*The evolution of Slovak fashion design has its own history since establishing of 1st fashion house in the 19th century in Bratislava. The natural continuity in the fashion design production in Slovakia was interrupted with the closure of private fashion houses after the year 1945. Despite the development between the years 1945-1990, as well as the closure of former large state-owned Slovak clothing firms during the 1990s and early 2000s, the Slovak fashion design has naturally developed and is even more differentiated in case of suppliers, producers and customers since early 1990s. Currently, the Bratislava region represents successful case in Slovakia in terms of localization of fashion designers.*
*This paper examines the value chain in the clothing industry in general, we have analysed more in detail value chain of Slovak fashion design in the Bratislava region, especially on the example of selected Slovak fashion designers, additional industries, institutional environment, etc.*

**Key words:** creative industry, value chain, fashion, fashion design

**JEL:** L67, Z10

## 1 Introduction

Fashion in its highest form is derived from inspiration and creativity. Creativity is a very emotive term in fashion and fashion design and fashion designers differ on its definition. Important role play fashion designers themselves, their imagination and fantasy, their view on society and human history and behavior (Santagata, 2002).

Fashion design as one of the creative industries is characterized by cyclical (seasonal) processes of continuous innovation, avoiding standardization of products and with the importance of knowledge, expertise, skills and talents of individuals. The structure of the industry is characterized by a large number of small firms, which are mainly concentrated in four major fashion capitals, supplying the global market: in Paris, London, Milan and New York (Wenting, 2008).

Fashion design originates in cities, where 80-85 % of designers work. Each city has its own “design identity”, or characteristics. Not only are cities a source of inspiration by night and day, buyers and sales people prefers them for convenience and distribution. All suitably sized companies have showrooms in the major cities, and within each city there are one or two specific fashion and garment districts (Jones, 2011).

The idea of the value chain is based on the process view of organisations, the idea of seeing a manufacturing (or service) organisation as a system, made up of subsystems each with inputs, transformation processes and outputs. Inputs, transformation processes, and outputs involve the acquisition and consumption of resources - money, labour, materials, equipment, buildings, land, administration and management. How value chain activities are carried out determines costs and affects profits (Porter, 1985).

According to Porter (1985), the primary activities are: (1) **Inbound Logistics** - involve relationships with suppliers and include all the activities required to receive, store, and disseminate inputs. (2) **Operations** - are all the activities required to transform inputs into outputs (products and services). (3) **Outbound Logistics** - include all the activities required to collect, store, and distribute the output. (4) **Marketing and Sales** - activities inform buyers about products and services, induce buyers to purchase them, and facilitate their purchase. (5) **Service** - includes all the activities required to keep the product or service working effectively for the buyer after it is sold and delivered.
Secondary activities are: (1) **Procurement** - is the acquisition of inputs, or resources, for the firm. (2) **Human Resource management** - consists of all activities involved in recruiting, hiring, training, developing, compensating and (if necessary) dismissing or laying off personnel. (3) **Technological Development** - pertains to the equipment, hardware, software, procedures and technical knowledge brought to bear in the firm's transformation of inputs into outputs. (4) **Infrastructure** - serves the company's needs and ties its various parts together, it consists of functions or departments such as accounting, legal, finance, planning, public affairs, government relations, quality assurance and general management
Our research of the value chain in the Slovak fashion design is based on the long-term research of the global value chain and production networks in clothing industry provided in Slovakia and Bulgaria (Smith, Pickles, Buček, Begg, 2003-1014). Some parts of the paper were discussed personally with prof. John Pickles during his stay in Slovakia at the University of Economics in Bratislava (2013-2014).
The aim of the paper was to analyze the Slovak fashion design in the Bratislava region from point of the value chain and to identify the main actors of this chain in the selected region.The paper is organized as follows. The second section highlights the methodology of the paper. The third section examines the value chain of clothing industry. In the next section we have analyzed the value chain of fashion design in the Bratislava region, specially value chain of selected Slovak fashion designers, additional industries, fashion platforms and institutional environment. In the final section we present paper conclusions.

## 2 Methodology

There are four basic dimensions that GVC methodology explores: (1) an input-output structure, which describes the process of transforming raw materials into final products; (2) a geographical consideration; (3) a governance structure, which explains how the value chain controlled; and (4) an institutional context in which the industry value chain is embedded. Using these four fundamental dimensions which describes the dynamic movement within the value chain by examining how producers shift between different stages of the chain. Early use of GVC methodology focused principally on economic and competitiveness issues, while recently social and environmental dimensions have been incorporated. GVC research is now

exploring new topics such as labor regulation issues, workforce development, the greening of value chains, and gender (Gereffi, Fernandez-Stark, 2011).
The used methodology is based on the methodology from the research project KRENAR with aim to analyzed selected creative industry – fashion design in the Bratislava region. One of the partial aims of the project was to analyze the value chain of fashion design.
There are various methods of global value chain (GVC) analysis, e.g. identify industry; to set up limits of chain; to map the main actors/components of chain, institutions, regulators; to look on relations supplier-produces, etc. (Pickles, 2014).
To reach the objectives of the research we have used two main approaches:

1. Primary research – analysis of primary information and data on the qualitative aspects of the Slovak fashion design. This research via 16 semi-structured face-to face interviews with key Slovak fashion designers in Bratislava, representatives of additional industries, e.g. modeling agencies in Bratislava (Elite Model Management, Mix Model Management) and university representative (Academy of Fine Arts and Design in Bratislava).
2. Secondary research – analysis of existing regional data obtained from Regional Statistical Office Database[1] and Institute of Informatics and Statistics (Infostat).[2] Other sources used for sector analysis are from Slovak economic journals and economic daily news, TV, etc.

From point of classification of economic activities NACE2 rev. (2008), fashion design belongs to group - specialized design activities. This group includes fashion design of textile, clothing, shoe, jewelry, furniture and other ware, industrial design, activities of graphic designers and interior decorators. In our research we have focused on clothing and jewelry design.

The selection of the Bratislava region for our research is based on identification of cluster of creative industries in this region (Rehák, Chovanec, 2012). The main location of Slovak fashion design is Bratislava.

The way of selection of respondents for interview was based on following criteria: we have focused on Slovak fashion designers with long-term experiences in the fashion design, as well as young talented fashion designers. The other group is represented by people from additional industries, e.g. modeling agencies (Elite Model Management), sale (shop of fashion design products) and representative from Academy of Fine Arts and Design in Bratislava. We have used outputs from 16 face-to-face interviews. To information from interviews we have added also information from various presentations organized by Slovak Fashion Council in Bratislava, as well as information from media – TV (TA3, RTVS, ČT, Fashion TV, etc.). The selection of two firms for value chain analysis is based on their long-term and successful business of these firms in the fashion design in Slovakia. These firms are leaders in the fashion design in Slovakia.

## 3 Value Chain in the Clothing Industry

From early on the clothing industry has been highly internationalised and characterised by highly fragmented value chains and cost driven-competition (Flecker, Holtgrewe, 2008).

[1] http://portal.statistics.sk, 22.6.2012
[2] http://www.infostat.sk, 20.6.2012

The apparel value chain is organized around 5 main segments: (1) raw material supply, including: natural and synthetic fibers; (2) provision of components, such as the yarns and fabrics manufactured by textile companies; (3) production networks made up of garment factories, including their domestic and overseas subcontractors; (4) export channels established by trade intermediaries;. and (5) marketing networks at the retail level. Over time, there have been continual shifts in the location of both the most significant apparel exporting countries and regions, as well as their main markets (Fernandez-Stark, Frederick, Gereffi, 2011).

The value chain of the clothing industry includes several links that represent different activities: (1) planning and development of collection; (2) design and prototyping of models; (3) production design, planning, monitoring; (4) manufacture and assembly of garments; (5) marketing; (6) distribution, logistics; (7) POS marketing; (8) sales. These activities can be carried out by one company at one or several regions or countries (vertical integration). The value chain may be fragmented so that the various functions are carried out by separate companies often in different regions and countries (vertical dis-integration). Individual clothing or fashion firms may cover different steps of the value chain and they may hold different strategic positions within it (Flecker, Holtgrewe, 2008).

There are 2 types of global value chains (Gereffi, Memedovic, 2003):

(1) Producer driven, (2) buyer driven. Apparel has been the classic “buyer-driven” global value chain. Unlike producer-driven chains, where profits come from scale, volume and technological advances, in the buyer-driven global apparel value chain, profits come from combinations of high-value research, design, sales, marketing, and financial services that allow the retailers, designers and marketers to act as strategic brokers in linking overseas factories and traders with product niches in their main consumer markets.

To understand how this division of work occurs and how initiatives to develop the workforce may affect the role developing countries play in the global value chain, six distinct value adding activities can be identified: (1) research and new product development (R&D), (2) design, (3) production, (4) logistics (purchasing and distribution), (5) marketing and branding, and (6) services (see Figure 1). What is striking about this schema is that the most important value-adding stages are intangible services that occur before and after the apparel production process, which requires us to expand considerably our ideas about where the greatest gains from workforce development are likely to occur (Fernandez-Stark, Frederick, Gereffi, 2011).

**R&D:** This value-adding function includes companies that engage in R&D, as well as activities related to improving the physical product or process and market and consumer research.

**Design:** This stage includes people and companies that offer aesthetic design services for products and components throughout the value chain. Design and style activities are used to attract attention, improve product performance, cut production costs, and give the product a strong competitive advantage in the target market.

**Purchasing/Sourcing (Inbound):** This stage refers to the inbound processes involved in purchasing and transporting textile products. It includes physically transporting products, as well as managing or providing technology and equipment for supply chain coordination. Logistics can involve domestic or overseas coordination.

**Production/Assembly/Cut, Make, Trim (CMT):** Apparel manufacturers cut and sew woven or knitted fabric or knit apparel directly from yarn. The cut-and-sew classification includes a diverse range of establishments making full lines of ready-to-wear and custom apparel.

Apparel manufacturers can be contractors, performing cutting or sewing operations on materials owned by others, or jobbers and tailors who manufacture custom garments for individual clients. Firms can purchase textiles from another establishment or make the textile components in-house.

**Distribution (Outbound):** After apparel is manufactured, it is distributed and sold via a network of wholesalers, agents, logistics firms, and other companies responsible for value-adding activities outside of production.

**Marketing and Sales:** This function includes all activities and companies associated with pricing, selling, and distributing a product, including activities such as branding or advertising. These companies frequently do not make any physical alternations to the product. Apparel is marketed and sold to consumers (via retail channels), institutions, or to the government.

**Services:** This includes any type of activity a firm or industry provides to its suppliers, buyers, or employees, typically as a way to distinguish itself from competitors in the market (e.g., offering consulting about international apparel businesses or fashion trends).

Opportunities for upgrading are shaped by the buyer-driven governance structure of the apparel industry. Humphrey and Schmitz (2002) identify four types of industrial upgrading: (1) *functional* (moving to higher-value functions); (2) *product* (producing higher-value products); (3) *process* (incorporation of more sophisticated technologies into production); and (4) *intersectoral* (leveraging expertise gained in one industrial sector to enter a new sector.) (Fernandez-Stark, Frederick, Gereffi, 2011).

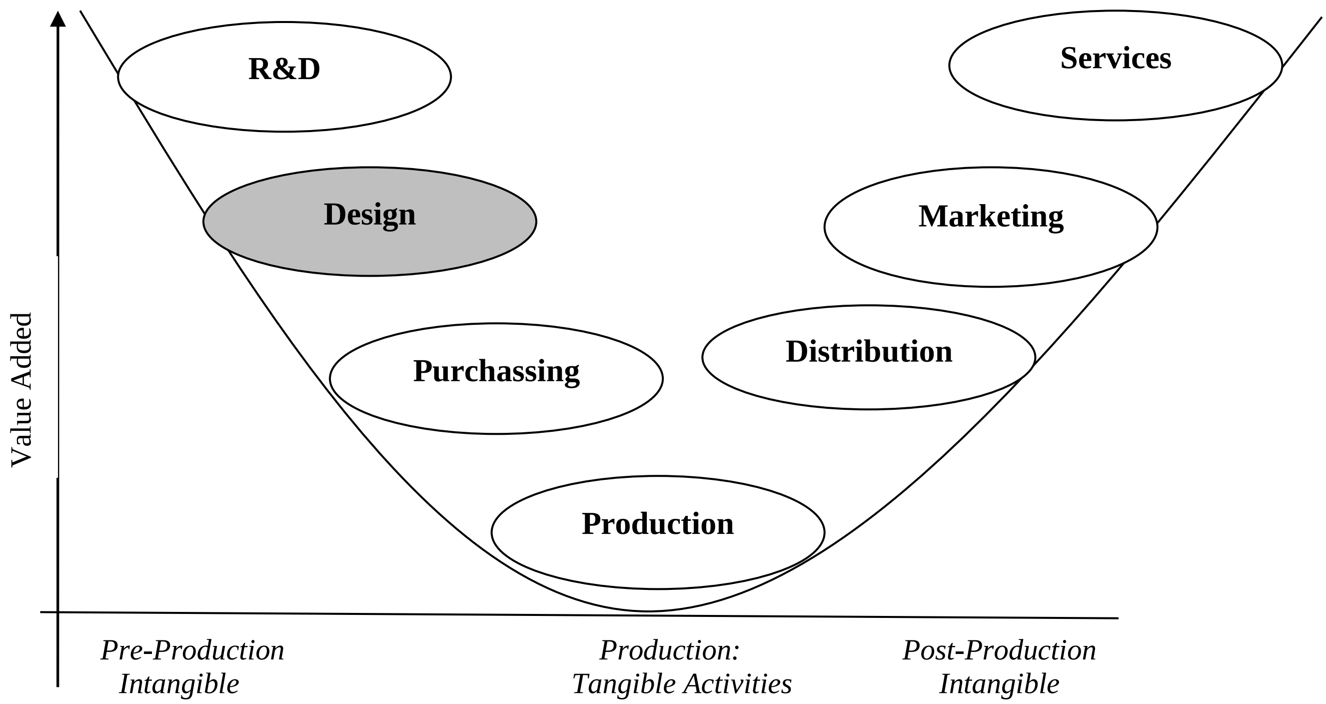


**Fig. 1 Curve of Value-Added Stages in the Apparel Global Value Chain**
Source: Frederick, 2011

## 4 Value Chain in Fashion Design in the Bratislava Region

Fashion design represents the higher value chain in the clothing industry. To main components of fashion design value chain in the Bratislava region belongs: (1) suppliers of fabrics and raw material; (2) producers – fashion designers; (3) distributors and sale of fashion design products; (4) customers; (5) additional industries; (6) institutional environment and platforms for presentation of fashion designers (fashion shows), etc.

1. To main Slovak suppliers of inputs and raw material belong Boritex and Koloria in Bratislava (sale of clothing fabrics). Koloria is on the Slovak market since 1992 and for fashion designers supply fabrics. Boritex is on the Slovak market since 2004 and is specialized on the wholesale and retail of fabrics with high level of quality.[3]
   By foreign suppliers, important factor is geographical proximity of locations such as Vienna and Prague, e.g. Komolka Stoffe (Vienna) and Aped (Prague), etc. The import of other materials was influenced by fact that some materials are not produced in Slovakia after 1989 anymore, e.g. yarn, imported mostly from Italy. The main criterion for selection of input materials from suppliers was identified quality of input materials.[4]
   In case of other Slovak fashion designers, except of traditional European suppliers (Italy, France, Spain) they have suppliers also from Asia (India, UAE - Dubai).[5]
2. The whole production process of Slovak fashion designers is usually managed by fashion designers. According to the popular Slovak fashion designer, *“own original collection for fashion show is created at least during 2 months (20-30 models).*[6] Production process in fashion design is based on the handwork, e.g. clothing sewing. In case of innovations between Slovak fashion designers, we have recorded new printing methods or smart tailoring processes.[7] The lack of product innovation is influenced by the fact, that there is much of handwork in the process of fashion creation (e.g. clothing sewing etc.) and it could be substitute just partially. From other product innovations, in the meantime we have recorded move in direction of using more qualitative materials, as well as new fabrics, also more naturalness of components used in production process. The Slovak fashion designers are mostly focused on women´s collection, production of men´s collection is more unique (e.g. Lýdia Eckhardt, Fero Mikloško, Lukáš Kimlička).
3. Important indicator of successful fashion designer is sale. The main distribution channels of Slovak fashion designers are fashion salons, fashion boutiques and internet shops. Online shops belong to innovative tools in fashion design sale and direct marketing is used by accessing new fashion customers.[8] Example of online shopping portal is “Fashion Days”. Through this internet portal is provided sale of fashion collection and products for women´s and men´s.[9]
   Sale of fashion garments from Slovak fashion designers is usually provided directly through fashion salons and showrooms in Bratislava. Slovak fashion designers prefer personal contacts with their customers, especially by fitting. Some of Slovak fashion designers (e.g. Fero Mikloško, Boris Hanečka, Jana Gavalcová, Marcel Holubec) have used the possibility to sale their own original collection through other fashion boutiques in the city centre of Bratislava (e.g. M.ONA Fashion Store[10], Ivica). The new young generation of Slovak fashion designers use also internet as distribution channel, with higher possibility to reach new customers. *“Internet presentation and sale of fashion collection on the internet represents the gap on the Slovak fashion market.”*[11]

[3] http://www.boritex.sk, 15.2.2013
[4] Interview, Bratislava, 15.1.2013, 21.2.2013
[5] Interview, Bratislava, 20.2.2013
[6] Interview, Bratislava, 7.3.2013
[7] Interview, Bratislava, 17.7.2013
[8] Interview, Bratislava, 20.2.2013
[9] Fashion Days, www.fashiondays.sk, 15.2.2013
[10] This concept store offers to customers fashion collection from Czech and Slovak fashion designers, http://monafashion.sk, 8.3.2013
[11] Interview, Bratislava, 20.2.2013

Despite the fact, that the internet may make shopping easier, generally Slovak fashion designers does not prefer internet as distribution channel, especially by the sale of fashion garments, e.g. evening dresses or wedding dresses, as there is requested more fitting and personal contact with customer as well. In case of fashion accessories Slovak fashion designers more use sale on the internet (e.g. jewelry, sunglasses, handbags, shoes).[12]

4. The typical customers of Slovak fashion designers are mostly women with over average wage. The main demand is coming from business area in Bratislava region, from "celebrities", government representatives and politicians, etc. During the last years we have observed also growing number of men customers. Mainly the customers are coming from Bratislava, some of them also from other Slovak regions. The dynamic of fashion market in Bratislava region is growing. The customers are usually more interested in fashion and they have intention to wear original fashion collection made by Slovak fashion designers. Some of the young Slovak fashion designers have customers also from abroad (e.g. Germany, Sri Lanka, reached especially through direct marketing channels).[13]
5. Slovak fashion designers used various services of additional industries (e.g. production and modeling agencies, make-up artists, fashion stylists, fashion photographers and other firms from additional industries) and there is also close cooperation with them. The most known production agencies in Bratislava are Star production and production house Forza. Star production is main organizer of "Bratislava Fashion Days". Production house Forza since its founding in 1994 has become one of the largest and prestigious production companies in Slovakia. Among other activities Forza also have organized fashion shows in cooperation with some Slovak fashion designers (e.g. Lýdia Eckhardt). Forza is also co-organizer of Miss Slovakia, the main competition of beauty in Slovakia.

   Modeling agencies represents also important part of fashion industry, especially by visual presentation of fashion collection through fashion models. The most important fashion agencies in Bratislava are Elite Model Management (office in Bratislava opened in 2002) and Exit Model Management (established in Bratislava in 1999). There are also smaller modeling agencies in Bratislava, e.g. Mix Model Management (established by former Slovak model in 2010) and Heriett Models, etc. Mix Model Management has recently contract with 85 fashion models, 95 % of fashion models are working abroad.[14] According to the head representative of Elite Model Management in Bratislava, the main localization factor to establish subsidiary of international modeling agency in Bratislava were low costs. Elite Model Management in Bratislava is recently representing 120 models and is oriented mostly on the foreign market, e.g. New York, Paris, Tokyo.[15]

   Other additional industry is representing by photographers. According to the opinion of modeling agency representative, the most important role in "fashion business" recently plays fashion photographers and fashion stylists, as they are together with fashion editors decided about the final visual presentation of fashion collection. Recently to the most important Slovak fashion photographers belongs Braňo Šimončík, Jakub Klimo, Lukáš Kimlička (also fashion designer and stylists), Stanislava Hricová, Petra Ficová, Anna Kovačič, Matúš Tóth.[16]The fashion styling in Bratislava is represented by Andrej Kusalík, Zuzana Kanisová, Brani Grohling and others.

   One of the most important role in presentation of fashion industry are playing media, especially printed media (e.g. fashion magazines), recently more and more critical role

[12] Interview, Bratislava, 7.3.2013
[13] Interview, Bratislava, 20.2.2013
[14] Interview, Bratislava, 18.6.2013
[15] Interview, Bratislava, 24.1.2014
[16] Interview, Bratislava, 24.1.2014

have especially new media channels (e.g. internet portals, social networks etc.). From Slovak fashion magazines the most known are Móda Revue, La Femme, Top Fashion and others. Fashion is presented regularly in TV (e.g. Fashion TV – established in Slovakia in 2009, TA3 TV-Showbiz, RTVS and others).

Beauty salons are representing important additional industry of fashion design, in case of Bratislava region especially during the last years. Another type of additional industry (production of fashion accessories), is also in production portfolio of other famous Slovak fashion designers (e.g. Lýdia Eckhardt and Fero Mikloško). Other typical additional industry is shoe and leather production, with long-term tradition in Slovakia.

6. Institutional environment and fashion platforms

The support environment of fashion design in Bratislava region is represented by association Slovak Fashion Council, sponsors, as well as various fashion platforms for presentation of fashion design production (e.g. fashion shows, jewelry exhibitions as well as other design sale exhibitions, etc.).

Slovak Fashion Council (SFC) was established in Bratislava in 2011. The aim of this initiative was to support Slovak professional fashion and textile designers, and firms in entering the local and especially the foreign market. Despite short history and just individual initiative of one fashion designer, it was important step in case of presentation Slovak fashion more abroad as before. According to Ms. Dana Kleinert, Slovak fashion designer and founder of the initiative "SFC", *"there was no platform in Slovakia like this, Slovak fashion designers have not communicated between each other. The institution wants to connect fashion designers, manufacturers in Slovakia and sale. In addition to this initiative there was an interactive internet portal developed, which will provide all practical information, guidance and should also be a gateway for foreign investors interested in Slovak fashion design and designers"*.[17]

We haven´t identified important influence of national or regional policy on the fashion design development in Bratislava region.

Bratislava region has various fashion platforms for presentation of Slovak fashion designers collection on fashion shows in Bratislava as well abroad, e.g. "Bratislava Fashion Days", "Bratislava Fashion Weekend", "Fashion LIVE!", "Bratislava Design Week", as well as other commercial fashion events, e.g. "Orange Fashion Show", etc..

With "Bratislava Fashion Days (BFD)", Bratislava has already 8 years platform where is presented the original fashion collections of Slovak fashion designers. Bratislava was established on the European fashion scene, as here are organized fashion shows at least twice per year – spring/summer collection in April and fall/winter collection in October. BFD are regularly organized by Mária Reháková, general director of STAR Production agency. Since 2013 Bratislava belongs to the network of world fashion weeks. There is also opportunity for young Slovak fashion designers, as thanks to the platform of BFD, they have opportunity to be presented in on "Slovak fashion Night" in New York.[18]

Another recent initiative is Fashion LIVE! This new initiative is example of cooperation of Slovak fashion designers, fashion brand Inpéria, La Femme and Slovak Fashion Council. This initiative would like to present local Slovak Fashion and local fashion brands to wide population, as the 1st and 2nd Fashion LIVE! has been organized in Bratislava in 2013 and 2014 with free access to public.[19]

[17] Interview, Bratislava, 28.2.2013, http://www.kleinert.sk, 1.3.2013
[18] TA3, 19.10.2013, http://www.agentura-promotion.sk, 10.2.2013
[19] TASR, 15.10.2013

## 4.1 Value chain of fashion design firm Lýdia Eckhardt

The value chain of fashion design firm Lýdia Eckhardt consists of suppliers of fabrics and materials, design and production, sale, customers, additional industries and platforms (Figure 2).

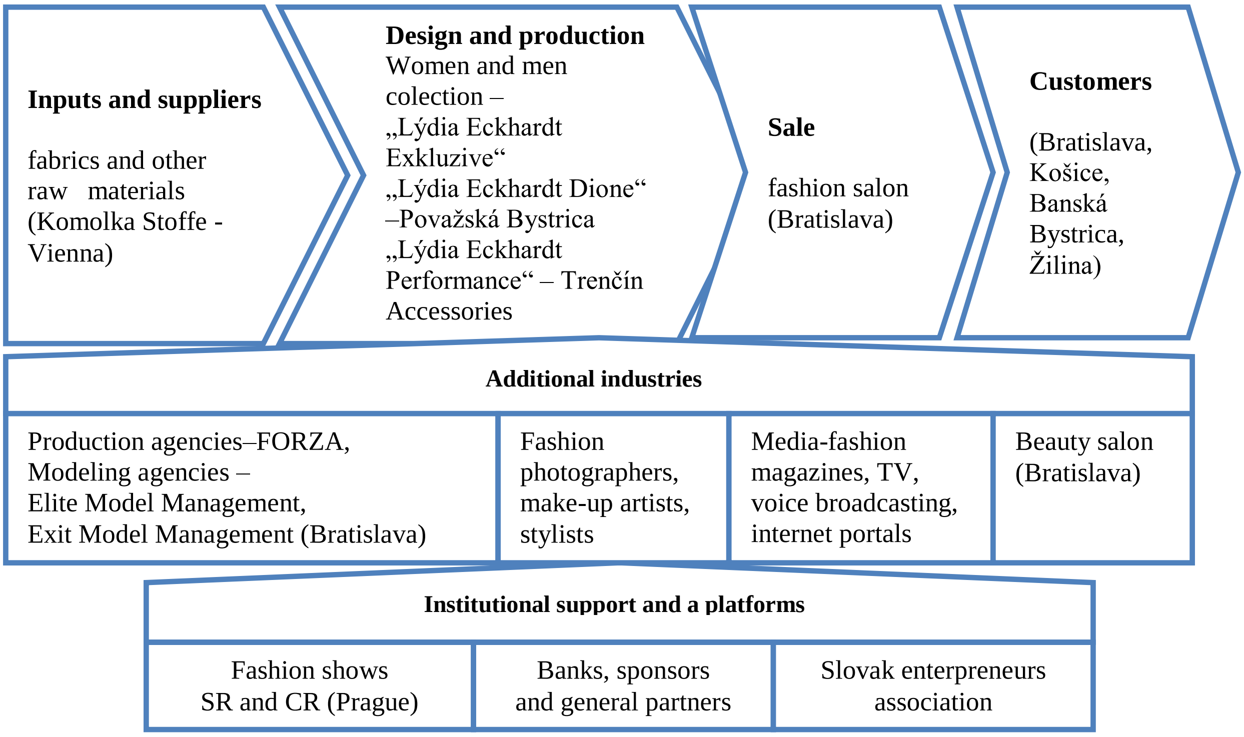


**Figure 2 Value chain of fashion design firm Lýdia Eckhardt**
Source: own ellaboration based on interview

The input cost covers majority in case of fashion design and cost for purchasing of material, sewing and cutting are risky according to success of fashion designer collection. The main supplier of fashion designer is Komolka Stoffe in Vienna.[20]

The production process in the firm looks like follows: selection of fashion line and price agreement with customer is followed by design, cutting and sewing of final model. The part of the value chain is also fitting mostly provided in fashion salon. In case of fashion designer the women collection is divided into more exclusive (more individual access to customer) and regular collection (production of small series). The men collection, production of men suit, is realised in Trenčín.

The sale of production is realised mostly in the fashion salon, as fashion designer prefer personal contact with customer. Fashion salon is more exceptional form of sale for fashion designer.

The crucial component of the fashion design firm value chain is customer. Customers are coming mostly from Bratislava, but also from other regional centres as Košice, Banskej Bystrica, Žilina, Martin, etc.). The brand „Lýdia Eckhardt“ is one of the most known and favorite in Slovakia especially by customers with over average wage (business, politicians, artists, etc.). *„The satisfy customer is the best advertisiment for fashion designer“.*[21]

[20] Interview, Bratislava, 15.1.2013
[21] Interview, Bratislava, 15.1.2013

*4.1.1 Additional industries*

In case of additional industries of Lýdia Eckhardt, fashion designer has used services of production and modeling agencies, photographers, make-up artists, stylists, media. Fashion designer also cooperated with firm in the glasses production. In 1995 Italian company OPTIGEN has started production of fashion glasses in cooperation with Slovak fashion designer Lýdia Eckhardt.

Fashion designer has started also business in other additional industry, since 2010 owns exclusive beauty salon in Bratislava River Park. The main reason for it was the gap on the Slovak market in providing this kind of services.[22]

*4.1.2 Fashion platforms*

The top of the value chain is presentation of fashion collection on the fashion shows. Lýdia Eckhardt is organising own fashion shows 2 times per year in Bratislava as well as in other Slovak regional centres (Košice, Prešov, Ružomberok, Poprad, Humenné). The fashion shows are exclusive and prestige event on the Slovak fashion scene. One fashion show consists of nearly 100 models of suits, is prepared during 3 months and employed 10 employees of the firms.[23]

*4.1.3 Institutional support*

The institutional support in case of Lýdia Eckhardt, fashion designer has not used support from SFC. Lýdia Eckhardt is a member of the Slovak enterpreneurs association. At the beginning of business in fashion design, fashion designer has used loans from banks. During the fashion shows, designer has regularly used support from sponsors and general partners.

## 4.2 Value chain of fashion design firm Miklosko Fashion Design (MFD)

The value chain of fashion design firm MFD consists of suppliers of fabrics and materials, design and production, sale, customers, additional industries and platforms (Figure 3).

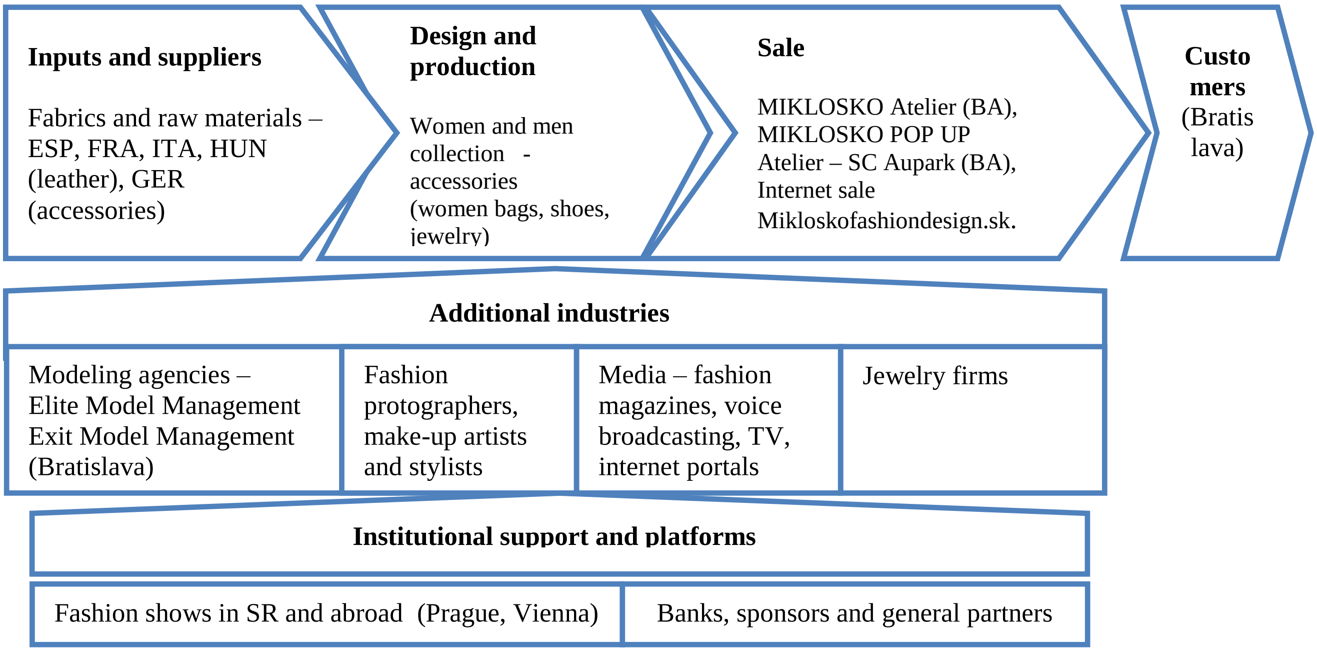


**Fig. 3 Value chain of fashion design firm MFD**
Source: own elaboration based on interviews

[22] Interview, Bratislava, 15.1.2013
[23] Interview, Bratislava, 15.1.2013

The main suppliers of fabrics and input materials of MFD are from Spain, France, Italy, Germany (accessories) and Hungary (leather for bags). In case of fabrics and input materials MFD prefer more expensive materials. In the recent “Little Black Collection” spring 2014 was presented 22 models of suits, preferring favorite materials as lace, brocade, silk or fur. [24]
Product portfolio of MFD is really wide, including women and men collection, as well as collection of jewelry.
Portfolio of production of MFD is really wide. Fashion designer produce women, as well as men collection, as well as own jewelry collection. Fashion designer is providing also individual customized creation. The creation of collection with 20-25 models of suits usually takes 2 months. [25]
The actual news in the MFD fashion collection is regularly updated on the Facebook web page of MFD, where are also coverage from fashion shows and other news from fashion designers collection.
The sale is follow-up on fashion collection presentation. The successful sale of fashion collection is crucial for fashion designer. “Fashion is not about thinking, it´s hard business"[26]
The sale of MFD is realised mostly in fashion salon, also via e-shop, which is functioning already 3 years. On the internet sale is available jewelry, e.g. earrings, bracelets, necklaces, broaches, headbands etc.[27]
The customers of MFD are mostly from Bratislava, mainly from business area, politicians and government representatives, celebrities, especially women.[28]

*4.2.1 Additional industries*

MFD has used services of production and modeling agencies as well, fashion photographers, make-up artists, stylists, media, jewelry firm (Spleen) and shoe producers. In jewelry design is active Slovak fashion designer Fero Mikloško, who has created jewelry collection in cooperation with firm Spleen.[29] MFD is also known through design of bags and pillows in cooperation with firm Dormeo.
In case of participation on the shoe production, an example is men´s collection Miklosko Jeans Design for period autumn/winter 2012-2013. The hand shoe production in Bratislava is provided by Mária Mikócsy, with production also of other fashion accessories (e.g. leather bags, belts etc.).[30]

*4.2.2 Fashion platforms*

The important part of the value chain is presentation of collection on the fashion shows. MFD belongs to the fashion designers that organized in Bratislava at least 2 times per year fashion show in Bratislava. The own presentation of fashion designer collection is important and characteristic feature of MFD. The fashion shows are exclusive and prestige on the Slovak level. MFD has also presented own fashion collection broad, e.g. in the neighboring countries (Vienna and Prague).

*4.2.3 Institutional support*

MFD has not used any support from SFC. Especially for fashion shows needs MFD has used support from commercial sector (banks, sponsors and general partners).

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[24] http://zena.sme.sk/c/7131400/miklosko-stavil-na-ciernu.html, 12.3.2014
[25] Interview, Bratislava, 7.3.2013
[26] Interview, Bratislava, 7.3.2013
[27] Interview, Bratislava, 7.3.2013
[28] Interview, Bratislava, 7.3.2013
[29] Interview, Bratislava, 7.3.2013, http://www.spleen.sk/miklosko-jewels.php, 27.1.2014
[30] http://topankynamieru.webnode.sk, 24.1.2014

## 5 Conclusions

Despite the negative development in the national clothing production in Slovakia since 1990s (decrease of production and employment), there is still further potential for growth in the Slovak fashion design production, as well as in additional industries. Commercial fashion design is represented by leader´s between Slovak fashion designers. The research in fashion design in Bratislava between Slovak fashion designers has allowed us to make a certain number of observations:

1. Slovak fashion design is even much more differentiated, in case of suppliers, producers, distributors and customers. The Slovak fashion designers use local suppliers, as well as foreign suppliers. The market of suppliers has changed in the meantime, from local Slovak suppliers or near localities (e.g. Vienna and Prague), towards other territories (e.g. Asia etc.). Slovak fashion designers preferred materials from abroad, especially because of good price/quality ratio. There is accent between fashion designers on sensitive high-tech material selection. In case of production, the whole production process is usually managed by fashion designers, except the quality of handwork we have observed also innovative productions processes (e.g. new printing methods, tailoring etc.). Sale of fashion production is usually provided directly through fashions salons, with individual approach to customer´s needs. We have recorded also increase in internet sale, especially in case of fashion accessories.
2. Additional industries plays important role in the value chain of fashion design in Bratislava region. We have observed positive development in services provided for fashion designers by modeling agencies, fashion photography, jewelry design, leather and shoe design, etc.
3. In case of institutional support, since early of 1990s, the development of Slovak fashion design was natural without any institutional support. Recently, the existing association (Slovak Fashion Council) is not accepted by all Slovak fashion designers and also presentation platforms could improve the presentation of Slovak design especially abroad. We have recorded increase of awareness of fashion design between Slovak population, as well as increase of information level of customers (e.g. through media, internet and social networks). Between Slovak customers has increased also the demand on quality of materials, as they are looking for more quality and composition of materials, with accent on nature materials.
4. The competition, despite that world fashion market become more and more globalized and competitive, Slovak fashion designers in the Bratislava region have not feel real competition between each other, as every fashion designer has own original style and attitude in creativity and innovation in the fashion design.
5. Original collection of Slovak fashion designers is regularly presented mostly on the fashion shows in Bratislava, but also other regional centres. During the years the level of presentation of Slovak fashion designers on the fashion shows has reached standards of others European "fashion cities". Global economic crisis has reached Slovak fashion designers after 2008 as well. They have felt the crisis in decreasing demand for fashion shows supported and sponsored by private companies.

In case of the future of Slovak fashion design, expansion of Slovak fashion design abroad, the limited factor is, that Slovak fashion designers are even not known on the Austrian or Czech market at all. There is possible further cooperation with neighboring countries (Czech Republic, Hungary), Austria through initiative of "Slovak Fashion Council", to present Slovak fashion design more worldwide, e.g. in countries with representation of Slovak communities abroad (USA, Canada, Great Britain, etc.).

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