

# European Textile and Fashion Associations: potential to boost sustainability in the fashion sector

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## Introduction

The European textile and fashion industry combines industrial manufacturing with cultural-creative production. This dual structure has historically underpinned European competitiveness, yet it also increases exposure to sustainability transition pressures, regulatory intensification, and evolving public norms around responsibility and transparency. EU-level initiatives linking circularity, due diligence, and competitiveness reshape the institutional conditions under which firms operate (Koszewska, 2018; Hörner Bussolo et al., 2025). Sustainability transitions in textiles are therefore governance-driven processes requiring coordination across fragmented value chains (Beyers & Heinrichs, 2020; Hernberg & Niinimäki, 2025).

Industry associations play a central role in this coordination. They can be conceptualised as meta-organisations and meso-level intermediaries that aggregate member interests, reduce coordination failures, and structure collective action under regulatory oversight (Mendoza et al., 2020; Martino & Polenzani, 2025). Through strategic communication and policy engagement, associations help shape the regulatory and normative environments in which firms compete (Bonardi et al., 2006). Yet existing research in textiles and fashion has largely focused on firm-level sustainability and consumer behaviour, leaving underexplored how associations articulate strategic priorities at sector level.

This study addresses that gap through a comparative qualitative content analysis of missions, visions, and strategic goals of organisations affiliated with EURATEX and the European Fashion Alliance (EFA). Strategic texts are treated as legitimacy instruments that articulate organisational identity, operational mechanisms, and normative futures (Aggerholm & Thomsen, 2012). The analysis examines how associations frame member value, competitiveness, sustainability integration, consumer-relevant themes, and European-level representation under conditions of green and regulatory transition.

## Methodology

The study employs qualitative content analysis of publicly available mission, vision, and strategic goal statements of organisations affiliated with EURATEX and EFA. Documents were included if they explicitly articulated organisational purpose, strategic objectives, or future aspirations.

The final corpus comprised six compiled documents analysed in ATLAS.ti, containing 111 coded quotations (EFA: 52; EURATEX: 59). Coding followed a hybrid deductive–inductive approach. Deductive categories were derived from the research questions and theoretical constructs such as intermediation (Martino & Polenzani, 2025), sustainability governance (Hörner Bussolo et al., 2025), nonmarket strategy (Bonardi et al., 2006), and transparency (Hauschild & Coll, 2023). Inductive coding captured emergent sector-specific themes.

Document-type sensitivity structured interpretation: missions were analysed as legitimacy- and identity-oriented statements; goals as operational mechanisms; and visions as projections of normative futures. Iterative comparison across networks and document types enhanced analytical robustness.

## Results and Discussion

Across both networks, associations position themselves as coordinators that enable rather than directly produce market or innovation outcomes. Member value is framed as association-mediated advantage achieved through coordination platforms, professionalisation, regulatory preparedness, and representation. Innovation appears implicitly as a consequence of strengthened sector conditions, supporting the interpretation of associations as meso-institutions structuring collective problem-solving in regulated environments (Martino & Polenzani, 2025; Mendoza et al., 2020).

The comparison reveals two complementary intermediation logics. EFA-affiliated organisations frame competitiveness through creative-system development, ecosystem visibility, and cultural positioning. EURATEX-affiliated organisations emphasise industrial performance, standards, and business-environment conditions. Sustainability is central in both networks but integrated differently: EFA foregrounds circular design and identity-driven transformation, whereas EURATEX frames sustainability as transition readiness and regulatory alignment. In both cases, sustainability discourse provides directionality rather than prescribing specific technologies, consistent with research on transition intermediaries (Beyers & Heinrichs, 2020; Hernberg & Niinimäki, 2025). Representation at EU level emerges as a core mandate. EURATEX adopts a governance-oriented repertoire centred on regulatory engagement, while EFA relies more on symbolic positioning and sector voice construction. These nonmarket strategies shape enabling conditions for innovation by influencing standards interpretation and compliance expectations (Bonardi et al., 2006). Consumer orientation remains secondary and largely mediated through sustainability and transparency narratives. Transparency and traceability are more explicit in EURATEX-related documents and framed as governance mechanisms (Hauschild & Coll, 2023; Bari et al., 2025). EFA-related texts emphasise awareness and cultural change. Overall, consumers function primarily as legitimacy audiences rather than direct strategic targets (Lim & Greenwood, 2017). The absence of overlap between the two affiliation networks further supports the interpretation that European textile and fashion transformation is coordinated through differentiated but complementary meso-level logics.

## Conclusions

This study shows that European textile and fashion associations affiliated with EURATEX and EFA articulate strategic priorities through shared emphasis on competitiveness, sustainability transition, member value creation, and representation, while enacting distinct intermediation logics. Associations operate as context-shaping actors that structure capability development, regulatory alignment, and collective direction-setting rather than as direct innovation producers.

The findings contribute to industry and innovation research by clarifying how industrial-governance coordination exist within this sector. They also demonstrate how missions, goals, and visions function as a strategic architecture distributing legitimacy work, operational mechanisms, and normative futures. Consumer orientation emerges as governance-mediated and secondary, reinforcing the institutional character of association-level strategy. Future research could connect communicated priorities to implemented programmes and policy outcomes, and examine how meso-level intermediation evolves under regulatory shocks. Moreover, this study underlines the potential that these association have in reducing environmental impacts of one of the most polluting sectors, both directly – acting with the companies – and indirectly – aiming at consumer behaviour and awareness.

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