

# Internationalisation of Polish Clothing Companies

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<sup>1</sup>University of Social Sciences in Lodz,  
ul. Kilińskiego 98, 90-012 Łódź, Poland  
\*E-mail: ewa.grandys@poczta.onet.pl

<sup>2</sup>Lodz University of Technology,  
ul. Żeromskiego 116, 90-024 Łódź, Poland

## Abstract

*Polish companies, including clothing companies delivering finished products and B2B garment manufacture services, increasingly internationalise their business. At the same time, the lines of internationalisation are determined by the companies' lines business. In order to establish the areas of international cooperation and the meaning of internationalisation in Polish clothing companies, an investigation using a review of pertinent literature and observation of the actual situation was undertaken. The second approach consisted of a number of specific methods that will be discussed in more detail in the article below. To fulfil the goal of the research several questions were asked: What aspects of clothing companies' internationalisation are covered by statistics? How has internationalisation changed their organisational structure? Why do clothing companies outsource manufacturing processes not only to Asian countries, but also to countries in Central and Eastern Europe (CEE), where labour costs are much higher? What criteria do they apply to choose the location of a foreign provider of supplies and materials? Is the selection of a fabric manufacturer secondary to the that of the location of a clothing manufacturer? The conclusions drawn from answers to these questions support the thesis that Polish clothing companies have internationalised three spheres of their activity: manufacturing (outsourced to Asia, Central and Eastern Asia, North Africa), sales (EU, Eastern Europe), the procurement of fabrics and supplies (EU, Asia), and the procurement of machinery and equipment (Western Europe, Asia).*

**Key words:** international trade, outsourcing, globalization, clothing companies.

## ■ Introduction

The world has for centuries been a huge space for interaction, but in the past contacts between different groups of society were not frequent. Globalization has shortened the distance between elites, contributing to shifts in the key relations between producers and consumers [1]. According to Stiglitz, globalisation is a force that has turned many things to the better. Participation in international trade has allowed many countries to develop faster, because export is a driver of economic growth. While western populations may consider that wages paid in Nike's Asian factories tantamount to the exploitation of local labour, for people

living in developing countries a factory job may seem a better option than farming rice at home [12]. The expansion of international trade is driven by economic centres that influence the way products are made and distributed in many national economies. The result of this is the international division of labour and dependency of most countries in the world on the best developed market economies [3]. International trade gained momentum in the last decade of the 20<sup>th</sup> c., but the international cooperation of companies (e.g. outsourcing arrangements) came into being much earlier. The term 'outsourcing' was coined in 1979 to describe changes in the organisation of production processes in the automotive industry. Bravard and Morgan consider that outsourcing, if properly applied, can play a central role in the holistic reorganisation of a company, make it easier for it to concentrate on commercial activity, and improve its financial result [4]. One of the available definitions describes outsourcing as a process that the parent company uses to take out some functions from its structure and transfer them to external service providers for execution [14]. Its author, M. Trocki, views outsourcing as a long-term strategic solution that only rarely has a tactical dimension (such as the delivery of specific services by external providers). The correctness of this opinion has been confirmed by the authors' research, according to which

until the late 1970s Polish manufacturers did not engage in any other business activity but making their own brands of products. It was only in the 1980s that they also started providing tactical B2B services involving the production of apparel for Western European and US firms. The experience they gained through international cooperation helped them successfully complete restructuring projects in the transition years after 1989. Their additional advantage was that they also had machines and equipment in good working condition, skilled workers guaranteeing high quality of workmanship as well as knowledge of manufacturing technologies and organisation.

This article was undertaken to gain insight into the internationalisation processes that Polish clothing companies have implemented in business areas such as the procurement of supplies, manufacture and sale of products. A general observation can be made that the internationalisation of these areas increased with the simplification of rules in international trade that began with association agreements between the EU and 10 CEE countries, which were followed by their full EU membership in 2004 [10]. Each of these three business areas underwent internationalisation in a different period. In the Polish clothing industry, the procurement of supplies and equipment was internationalised the earliest, but real

changes came with the internationalisation of manufacturing. Sale processes were internationalised and chains of outlets were established abroad only after the domestic market was saturated and the entry requirements of new markets discerned.

Two methods were used to attain the goal of the research: a review of the pertinent literature and observation of the actual situation in industry. In the second case, the following specific methods were adopted:

- the analysis of secondary (e.g. statistical) data,
- participatory observation (both authors are researchers with hands-on experience in the national economy); it was selected because of Babbie's opinion that close participatory observation is an efficient tool for investigating social processes (and economic (added by the authors)) [2],
- interviews with open questions conducted with the managers of clothing companies [2],
- the monitoring of other sources of information (scientific and industry conferences, etc.).

Information gathered from those sources was used to formulate a general, although incomplete, explanation of the phenomena observed and to answer the research questions.

## The internationalisation of clothing production

The results of the authors' research have confirmed that the restructuring of existing clothing companies and establishment of new ones in the late 20<sup>th</sup> c. were driven by the assumption that the production of clothing could be divided into two activities performed separately from each other. This led to the emergence of two categories of companies that are briefly characterised below.

1. The first category of companies carries out processes preceding and following manufacture, whereas manufacture itself is outsourced to external providers. Accordingly their organisational structure is made up of functional units in charge of:

- clothing market research and analysis,
- product development (the creation of spring-summer and autumn-winter fashion collections) and product profitability analysis,

- the technological side of manufacturing processes,
- the procurement of materials and supplies,
- the organisation and supervision of manufacturing (i.e. making sure that the manufacturer's technological capabilities are consistent with the technology selected and quality of workmanship expected),
- product marketing and distribution, and the establishment of a distribution network.

Such companies are mostly large, multi-tier organisations. Because they do not manufacture their products themselves, they can employ fewer workers, which is an important advantage because employment in the clothing industry is particularly high on account of large inputs of human labour that are required to make apparel. The automation of production is affordable to a limited extent, because the complex construction of garments involves high costs of industrial machines [15]. Hence the main reason for clothing companies to go international is to cut their production costs by moving manufacturing processes to countries where labour costs are low (Asia, North Africa), but the demographic implosion in Europe, resulting in labour shortages (the UN predicts that the population of Europe will shrink from 728.8 million in 2010 to between 557 and 653 million in 2050 [6]), is also a factor.

In choosing a location for manufacturing processes, companies consider the number of pieces of same-design clothing that they want to be made for them. Accordingly **small batches of products** are outsourced to CEE countries and North Africa, because the proximity between the client and manufacturer makes communication easy, increases the efficiency of product quality inspection and reduces the delivery times. The latter factor is important because small-batch luxury garments are short-lived, seasonal products [5] that are vulnerable to changes in fashion trends. That production costs in the CEE and North African countries are higher than in Asia is irrelevant because the prices of high-end apparel have little effect on the decisions of those who buy them. It is interesting to note in the case of many global brands (Gucci, Armani, Versace, etc.) that have retail outlets all over the world, a batch may, in fact, consist of as many as several thousands of pieces made to the same design. How-

ever, because a single store has only several of them on sale, they are treated as small-batch products. Their distinctive feature is that their brand is the name of the fashion creator. The production of **large batches of garments** is outsourced to Asian countries and then finished products are delivered to Europe by sea. Maritime transport extends the delivery times, but the low costs of manufacturing and of transport make such products affordable to medium-income customers. The products display brands created by their producers and are distributed through the producers' own retail chains (a case in point is Spain's Zara). In Poland, an example of a clothing company concentrated on the stages of product development and distribution is LPP SA, which will be discussed in more detail in the section „A case study: internationalisation of business processes in LPP SA”. There is also no-brand mass-made clothing or clothing with unknown brands made in Asia that Polish customers can buy in supermarkets, but this market segment will not be discussed for its lack of relationship with the activities of the Polish clothing industry.

2. The second group of Polish clothing companies provides manufacturing services for large corporations at home and in Western Europe, which is also an indication that they have internationalised their business. Because they cannot compete with Asian prices, they have developed flexibility in coping with changing production demands that allows them to deliver small batches of products. The main components of their organisational structure are the following:

- warehouses (with stocks of materials, supplies, sewing machines, spare parts),
- units in charge of technological and organisational aspects of production,
- a cutting room (where garment components are cut out, fused with other elements, numbered, inspected for quality and bundled together into units for the sewing room teams),
- a sewing room where bundles of prepared elements are assembled into finished products and inspected for quality,
- a finishing room where finished products are treated thermally, bagged and boxed,
- a finished-product warehouse (where products are assembled per order and shipped to customers).

**Table 1.** Polish clothing companies as of 1st Jan. 2015. *Source:* authors' own calculations and data from [11], pp. 42, 54.

Specification	Total	of which medium and large firms	medium and large firms as %
No. of companies with more than 9 workers	2,328	323	13.9
Production sold, PLN million	6,651.6	3,583.7	53.9
Employment, thousands	72.8	38.6	53.0

Clothing companies specialising in B2B services are medium-sized organisations (smaller organisations have insufficient production capacity) with flat structures. This solution allows them to reduce overheads and removes the need to pay the costs of materials, supplies and transport that companies with a full production cycle have to bear.

Both categories of companies also have human resource management and financial units, but these units will not be discussed in terms of their weak relationship with the main subject of the article.

3. The third category of clothing company performs a full production cycle. Most of them are family firms operating in local markets. They are important for the national economy (e.g. as job creators) because of their large number (**Table 1**).

The *Statistical Yearbook of Industry 2015*, which the Central Statistical Office (GUS) published in late February 2016, presents data characterising the condition of the Polish economy at the end of 2014. The data show that of 12,908 clothing companies only 2,328 employed more than 9 workers. Medium- and large-sized organisations (with employment exceeding 49 workers) accounted for 13.9%. Notwithstanding their small proportion, they contributed the most to production sold (53.9%) and job creation (53.0%) – **Table 1**. As will be shown below, only the large and medium-sized companies can internationalise their business or already benefit from this process.

### International trade activity of the Polish clothing industry

The authors of the article have monitored foreign trade activities in the Polish clothing industry for many years [7, 8]. The structure of its imports includes:

- machinery and equipment (sourced from EU countries and Japan),
- fabrics and sewing supplies such as non-wovens, threads and accessories (EU and Asia),

- B2B garment manufacture services purchased in Central and Eastern Europe, Asia, and North Africa.

As regards exports, their structure consists of finished garments (delivered mainly to the CEE markets) and B2B garment manufacture services provided for clients in Western Europe.

Before the transition, companies were state-owned and only few of them participated in international trade. Their resources of foreign currencies were scarce, even when they exported their products. The meagre allocations of foreign currencies they received from the government were primarily used to buy spare parts abroad to maintain their mostly foreign-made machines in good working order. In this situation, the necessary material inputs had to be bought at home. In relation to the production of the domestic clothing industry, imports from Western Europe were very small. However, by early 2015, the number of state-owned clothing companies had decreased to only 5 [11, p. 42]. With the relaxation of international trade rules and following privatisation processes in industry, the procurement of supplies has changed as well. Today if a clothing company chooses an Asian manufacturer as the provider of its products, the necessary fabrics and accessories are acquired in the same region, because local supplies and materials are not only price competitive but also involve lower transportation costs. Poland-based producers of clothing select their providers of supplies based on the market segment for which products will be made. Fabrics for high-end products are acquired from renowned manufacturers in Western Europe that guarantee high quality of products and accept small orders (this is important when small batches of garments are planned to be made). The existing statistics are not very useful in arriving at the value of Polish imports of fabrics, because imports and exports of clothing textiles and of industrial textiles are presented as aggregate numbers. The share of industrial textiles is considerable and shows a rising trend. Industri-

al textiles are used in packaging (sacks), geotechnical engineering (reinforcement of earthen structures), securing mining excavations (antistatic textiles), mulching (woven and non-woven agricultural fabric), upholstery, insulation for buildings and structures (vapour permeable membranes), etc. Because data on the imports of exclusively clothing textiles are not available, the discussion below will be limited to the imports and exports of clothing and of garment manufacture services (**Table 2**). This group of statistical data started to be presented as a separate section of international trade activity in 2008. The period of observation adopted for research purposes seems sufficient to reveal trends in international trade activities conducted by the industry under consideration.

The data in **Table 2** show that the import and export of B2B garment manufacture services (rows 2 and 4) stabilised towards the end of the period investigated at around PLN 1.7 bn and circa. 3.3, respectively. The Polish providers of B2B services usually deliver small batches of garments for customers in highly developed countries, which explains the countries' share of 87.3% in the value of such services [11, p. 405]. Because of the short geographical distance between Polish manufacturers and the German market (the main market for Polish firms), completed products can be promptly delivered, which is a key advantage in the case of seasonal products.

Garments marketed in Poland are made at home or imported from Western Europe (high-end products) or from Asia (all other market segments). Between 2009 and 2014, clothing imports rose from PLN 10,631.0m to 16,772.7m (by 57.8%; **Table 2**, row 1) and exports from PLN 9,728.8m to 14,916.1m (53.3%; **Table 2**, row 3), which indicates that imports grew at a much faster rate. Furthermore the numbers in row 5 (showing differences between the numbers in rows 1 and 3) reveal that in the years 2009-2014 the value of imports was greater than of exports. This surplus shrank suddenly in the years 2012-2013 but expanded rapidly in 2014, partly due to the growing demand for luxury goods. It must be noted, however, that a fully reliable interpretation of the available statistics is not possible because of special legal solutions that companies use to run their business (see the example below).



Example: LPP SA, a Polish clothing company, makes the bulk of its products in Asia under B2B arrangements and then imports finished garments to Poland, but in some cases, garments are exported directly from Asian manufacturers to LPP's foreign customers. The operations are conducted based on a sublicense agreement that LPP has concluded with the Cyprus company Gothals. Because the national statistics are not always reported on these operations, it is difficult to correctly interpret data on international trade in commodities.

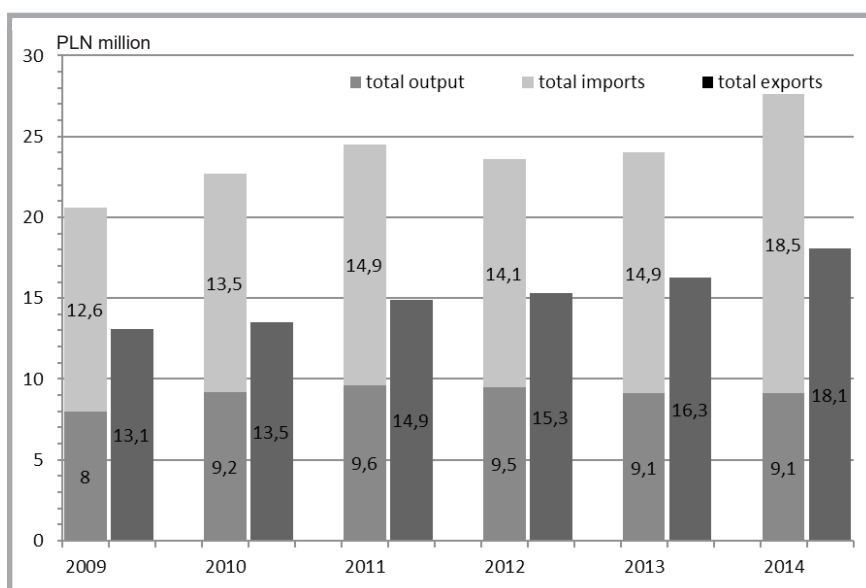
As part of the analysis, changes in clothing exports as a share of the total output of clothing in Poland were investigated. The pertinent statistical data and the results of calculations are shown in **Table 3**.

The data in row 1 in **Table 3** were obtained from the GUS (Central Statistical Office) [11]. The numbers in rows 2 and 4 were calculated using data in **Table 2**. The numbers in row 3 were obtained by adding up numbers from rows 1 and 2 in **Table 3**. They show that the value of clothing exported from Poland exceeded the value of the total output of clothing (clothing products plus B2B services). The numbers in row 5 are clothing exports as a percentage of values presented in row 3. They reveal that after 2012 the clothing exports' share of the aggregate value of the total output of clothing and of clothing imports was around 65%. **Figure 1** illustrates the data graphically in **Table 2**.

The discussion above has shown that Polish clothing companies export products made at home (clothing products and B2B services) and outsourced to foreign manufacturers (these are considered imports for statistical purposes). Further expansion of companies' export activities will depend on the establishment of their own retail chains and the promotion of domestic clothing brands in international markets.

### Case study: internationalisation of business processes in LPP SA

LPP SA, a Polish clothing company, was established in Gdańsk in 1995. The Polish part of its business consists of two elements, i.e. product development and preparation of production and the distribution of finished products. LPP co-



**Figure 1.** Output, import and export of clothing and B2B garment manufacture services in Poland per PKWiU in PLN million. **Source:** developed by the authors.

**Table 2.** International trade in clothing in Poland [PLN million]. \*PKWiU – Polish Classification of Goods And Services; PKD – Polish Classification of Activities. **Source:** authors' calculations and data from [11], pp. 405, 410, 414, 418.

Specification	2009	2010	2011	2012	2013	2014
Clothing imports (per PKWiU*)	10,631.0	11,548.4	13,065.3	12,361.0	13,155.6	16,772.7
Import of B2B garment manufacture services (per PKD)	2,018.3	1,910.8	1,811.5	1,766.9	1,713.0	1,694.5
Clothing exports (per PKWiU)	9,728.8	10,255.1	11,574.9	11,880.7	12,986.8	14,916.1
Export of B2B garment manufacture services (per PKD)	3,366.3	3,229.0	3,321.2	3,442.6	3,345.6	3,206.1
Import surplus over exports (per PKWiU)	902.2	1,293.3	1,490.4	480.3	168.8	1,856.6

operates with clothing manufacturers in Asia, where it also buys the necessary fabrics, supplies and materials (internationalisation). The company's portfolio of brands consists of Reserved, House, Cropp, Mohito and Sinsay. In 2001 LPP SA entered the Warsaw Stock Exchange (WSE) and in 2014 it was incorporated in WIG20 (a WSE index consisting of the 20 largest public companies) and the Morgan Stanley Capital International Index (MSCI), which is another indication of the international character of its business. In 2002, LPP SA decided to become an international organisation. The 'Reserved' brand was introduced into Estonia, the Czech Republic and Hungary. Within the next twelve months, LPP extended its international presence to Lithuania, Ukraine, Slovakia and Russia. In 2005, the 'Cropp Town' brand was introduced into the Estonian, Czech, Hungarian, Slovak, Latvian, Lithuanian and Russian markets. Three years later, in 2008, LPP SA started to export its products to Romania. LPP's exports now generate one-third of its revenue, half of

which comes from sales in Russia. The rate growth of LPP's exports seems to indicate that the company's strategic objective is to become a major player in the CEE markets. According to its most recent plans, the next objective is the United Arab Emirates and other markets in the region (Kuwait, Saudi Arabia, and Bahrain). In the opinion of Z. Husak [9], LPP SA has gone through the process of internationalisation and the experiences it has gained in its course are a solid basis for its further growth. The company has representative offices in Shanghai and Dhaka (the capital city of Bangladesh) that scout for providers of supplies and B2B services as well as support local manufacturers of clothing in:

- maintaining the quality of B2B services expected,
- supervising working conditions.

The need to supervise working conditions in foreign factories arose when a factory building collapsed in Bangladesh in April 2013, involving the death of 1,127 workers. An investigation showed

**Table 3.** Output, import and export of clothing per PKWiU in PLN million. *Source:* authors' calculations and data from [11], p. 80.

No.	Specification	2009	2010	2011	2012	2013	2014
1	Total output (clothing products and B2B services)	8,046.8	9,210.9	9,573.0	9,539.1	9,193.1	9,148.9
2	Total imports (clothing products and B2B services)	12,649.3	13,459.2	14,876.8	14,127.9	14,868.6	18,467.2
3	Output + imports	20,696.1	22,670.1	24,449.8	23,667.0	24,061.7	27,616.1
4	Total exports (clothing products and B2B services)	13,095.1	13,484.1	14,896.1	15,323.3	16,332.4	18,122.2
5	Exports as % of values in row 3	63.3	59.5	60.9	64.7	66.4	65.6

that the user of the building, a provider of garment manufacture services (one of its customers was LPP SA), failed to maintain the building in a good state of repair to save on production costs. For humanitarian reasons and to clean up its image, LPP SA signed the Accord on Fire and Building Safety in Bangladesh, an agreement designed to improve work safety in Bangladesh's factories. This groundbreaking pact has brought together clothing companies as well as international and local non-government organisations. It has been signed by over 100 (mainly European) clothing companies (another indication of LPP's international presence). Its signatories thereby pledged to pay membership dues, which in the case of LPP SA were set at the level of 2.5 million USD. This and similar initiatives are an example of efforts to reconcile social solidarity and the pace of economic development [13].

LPP's decision of January 2014 to optimise its tax liabilities by transferring the ownership of its brands to the company's subsidiaries in Cyprus and the United Arab Emirates, although entirely legal, also brought negative publicity to the company. The organisation of Young Socialists appealed through Facebook to boycott LPP's products and fliers accusing the company of trying to avoid the payment of taxes in Poland were planted in its stores. Additional controversies were fuelled by Facebook's decision to remove the anti-LPP campaign page in response to demands from the company's lawyers, who claimed that LPP's copyright on its trademarks was being infringed. In May 2015, LPP SA announced that it would wind up its Cyprus subsidiary Gothals under a cross-border merger and would incorporate it with all assets into LPP Capital Group.

The fact that LPP was mentioned in connection with a collapsed factory building in Bangladesh and the public reaction to its attempts at optimising its tax liabilities

show that internationalisation may have a downside too.

## ■ Summation

The findings above support the thesis that clothing companies in Poland have become international organisations. Below, three business areas in which internationalisation took place and the specific results of this process are presented.

**1. The internationalisation of clothing manufacture** has influenced companies' business profiles. Based on their organisational solutions, clothing companies can now be divided into organisations running a full production cycle, organisations focused on organising manufacturing processes and the distribution of products, and manufacturers of clothing. The last two categories of companies have internationalised product manufacture, respectively, commissioning large batches of clothing and making small batches of clothing under B2B arrangements. The manufacture of products is outsourced to other regions of the world in order to reduce costs. The selection of the place where products will be made is also determined by competitive advantages that can be achieved, such as product quality offered by manufacturers in a particular region and possible short time between the completion of an order and the date on which a product is placed on the target market. A correlation can also be observed between locations where products are made and in which materials and supplies are obtained. Accordingly two lines of international cooperation have emerged:

- Asian countries provide large batches of garments because locally offered materials and supplies have competitive prices and the costs of delivering them to a manufacturer in the same region are low. The quality of Asian products is now acceptable for medium-income customers, who are not very sensitive to fashion, and

hence longer times between the end of manufacture and the delivery of a finished product to the European market (because of sea transport) can be accepted.

- Western European countries are providers of fabrics and supplies for short batches of garments because of the high quality of their products and flexibility in handling small orders. The manufacture of small batches of garments is outsourced to countries in Central and Eastern Europe and North Africa. Because of the relatively short distance between the client and manufacturer, communication is easy and quality control more efficient, which guarantees that the final product will have the quality expected. Another important advantage of this solution is that finished products can be promptly delivered to the designated market. Although the costs of labour and supplies in these regions are higher than in Asia, they can be easily built into the prices of high-end garments with limited effect on the buyers' decisions.

The above shows that clothing companies deciding to outsource the manufacture of their products to different regions of the world consider not only labour costs but also the quality of workmanship and number of products of the same design they will want to be made; the location of the manufacturer is also strongly correlated with the location of suppliers of materials and supplies.

**2. The internationalisation of the sale of clothing products** can be estimated from the GUS data. It was not until 2008 that products were taken out from the group of textile products to be shown in the *Statistical Yearbook of Industry* as a separate section of international trade. An analysis of the data in **Table 2** leads to the following conclusions:

- The value of imported and exported **B2B garment manufacture services** stabilised in the years 2012 - 2014 at circa PLN 1.7 bn and circa PLN 3.3 bn, respectively. Export arrangements involved the delivery of small batches of garments, which explains why in value terms 87.3% of such services were performed on behalf of partners in developed countries (mainly Germany). Polish manufacturers are awarded contracts because their proximity allows finished garments to be promptly delivered to

the customer (fashion products must match the season).

- The 2014 value of **clothing imports** was PLN 16.8 bn compared with PLN 14.9 for clothing exports. Clothing imported from Western Europe was usually meant for higher segments of the Polish market while Asian imports were addressed to less prosperous customers. The value of clothing imports increased between 2009 and 2014 from PLN 10,631.0 m to PLN 16,772.7 m (by 57.8%). In the same period, clothing exports rose from PLN 9,728.8 m to 14,916.1 m (by 53.2%). The growth rate of exports was therefore smaller by 4.6 percentage points.
- Clothing exports as a proportion of total clothing imports and the production of clothing companies together (**Table 3**, row 5) started to increase from 2010, rising from 59.5% in 2010 to 65.6% in 2014, meaning that one-third of clothing (made in Poland and by foreign service providers) was sold at home and two-thirds abroad. This indicates that companies have established distribution channels that can be useful for them in expanding their exports (**Table 2**, row 3).

3. All clothing companies in Poland have **internationalised their purchases of materials, machinery and equipment**. The international trade statistics do not show the values of equipment imported by particular branches. The only evidence that equipment is purchased abroad is the names of its producers. Sewing machines are most frequently purchased from Dürkopp-Adler, Pfaff, Juki, Yamato, and AMF Recce, belt fusing machines from Meyer, cutting machines and thermal processing equipment from Kuris, pneumatic presses from Rotondi, and ironing tables from Comel.

The main locations from which fabrics and accessories are imported show correlation with locations where products are made (see page 14 for more details). Statistics on the values of textile imports do not distinguish between industrial textiles and clothing fabrics, and hence it is not possible to determine the scale of clothing companies' international purchases in absolute numbers.

The article provides evidence that clothing companies use international markets to acquire:

- materials and supplies (the textile industry in Poland has been degraded),
- machinery and equipment (their production in Poland is very limited).

The results of the research lead to the conclusion that Polish clothing companies will certainly continue to use internationalisation as a vehicle for expanding their business and that the process will contribute to better efficiency of management.



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