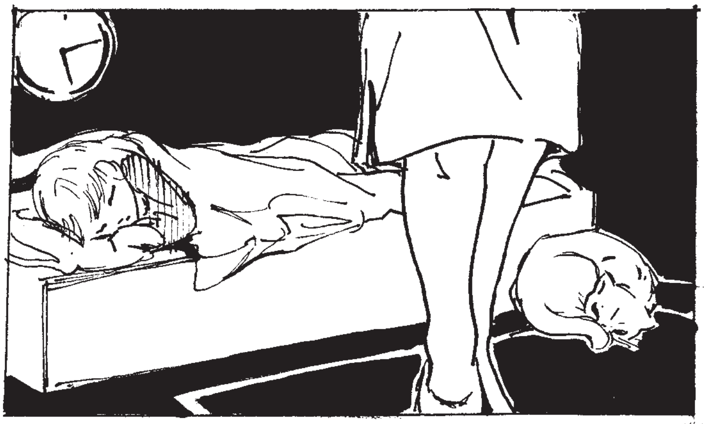
FAIR PLAY

always in fashion



FAIR PLAY
always in fashion

Consumers' awareness
and working conditions of women
in sporting goods industry

Introduction

We present a report "Fair play – always in fashion" on sportswear in Poland. On who, where and in what conditions produces it, and who and why buys it. The report portrays Polish manufacturers, workers, consumers and the relationships among all these groups. We are trying to show how the existence of Polish producers is contingent on the trends in the global clothing industry, how the situation of Polish seamstresses depends on the working conditions in Asian factories and, finally, how much can be changed by consumers who make informed purchase decisions and demand that clothing is produced with the noble sporting 'fair play' principle observed also on the work floor with respect to workers employed in sportswear manufacturing.

The "Fair play – always in fashion" report is a result of an analysis of available data and publications as well as interviews with producers, workers and consumers, unionists and sportswear market specialists. KARAT did its research in Poland but we have tried to keep the international context in mind, taking into account the issues of globalization (transferring production to Asian countries), development (working standards in developing countries), Corporate Social Responsibility (efficiency of its implementation in sporting goods manufacturing) and consumer awareness (its presence and development in Poland). We have been particularly interested in the impact all these phenomena have on working conditions in sportswear manufacturing where mainly women are employed.

The Report has been drawn up as part of the project: *"Mobilizing for a sectoral programme of work for social quality management in the sporting goods industry"* (*"Fair Play in Sporting Goods Production"*) co-financed by European Commission and implemented by KARAT as one of partner organizations. The research findings published in the Report will form the basis for KARAT's future actions within this project and more broadly – as part of international actions carried out by the Clean Clothes Campaign and the Olympic PlayFair2008 campaign.

For several years KARAT in cooperation with the Clean Clothes Campaign has been monitoring working conditions in Polish clothing factories. Initially, also the *"Fair Play in Sporting Goods Production"* project was to focus solely on the investigation on working conditions in factories producing sportswear for world brands. Between the time when project was firstly developed and the time when its implementation started, sportswear industry in Poland changed with its characteristic dynamics. Big corporations have withdrawn their production and consumption has been growing rapidly in Poland. In this respect, our society has switched to the "western" lifestyle. This confirmed our belief that also in Poland it is now time to work with consumers and get them involved in campaigns for improving working conditions in the production of the clothes they buy.

KARAT Coalition

About the Project

"Mobilizing for a sectoral programme of work for social quality management in the sporting goods industry" (*"Fair Play in Sporting Goods Production")* is a three-year project co-financed by the European Commission and implemented with our partners from Austria (Südwind Agentur) and Germany (Inkota). Its main objective is to raise public awareness of working conditions in factories producing goods for the sporting sector and to increase their involvement in actions to improve the current situation.

Project's activities in Poland particularly involve: research and publishing report on the sportswear sector in Poland, developing and distributing information and campaigning materials in Polish, forming and developing a network of activists, as well as conducting awareness raising campaigns and actions together to improve working conditions and promote responsible purchasing practices. Finally, international cooperation, information and experience exchange as well as common actions on international level are very important aspects of the project. The project is strongly associated with important sporting events taking place in 2008: Euro 2008 in Austria and Switzerland as well as the Olympics in Beijing.

For more information about the project, important events and contacts see: www.kobietypraca.org/playfair.

Karat Coalition

KARAT Coalition is an international network of gender organizations. It focuses mainly on women's economic and social situation, also in the context of development issues. The coalition unites organizations from Central and Eastern Europe and the Commonwealth of Independent States countries. KARAT's work involves: coordinating international cooperation, strengthening organizations in the region, monitoring the implementation of governments' international obligations related to gender and development issues, lobbying at the UN and EU forum, awareness raising actions, publications, trainings, conferences etc.

One of KARAT's programs is "Women's Working Conditions". Under this program, KARAT has been monitoring working conditions in garment industry, electronic industry and at supermarkets, where mostly women are employed.

For more information on KARAT Coalition, its member organizations, areas of work, programs and tasks pursued, see www.karat.org.

Clean Clothes Campaign

Clean Clothes Campaign is an international coalition of non-governmental organizations, trade unions, employees and consumers who take action to improve working conditions and strengthen the position of clothing industry workers worldwide. Above all, the Clean Clothes Campaign fights against the abuse of workers employed in this industry – most of them are women – violation of labour codes and international labour law standards. KARAT has been cooperating with the CCC since 2003.

For more information on Clean Clothes Camapign, see: www.cleanclothes.org.

PlayFair2008

PlayFair2008 is an international campaign pursued in the lead up to the Olympic Games, appealing for the respect for Olympic values, the fair pair principle in particular, also with reference to workers employed in sporting goods production. KARAT is a supporter of the PlayFair2008 campaign.

For more information on the campaign, the events planned for 2008 and past events, see: www.playfair2008.org.

MADE IN POLAND

Sportswear production in Poland. The present situation, its contingencies and forecasts for the future. The manufacturers' and the employees' perspective.

Basic facts about clothing production

Clothing industry is 8.3% of all the world manufacturing, and 5.7% of products sold worldwide are clothes. The industry accounts for as much as 14% of world employment.[1]

In Poland, the clothing industry has a long history and profound significance. Since 1989, though, the sector has been undergoing constant change. With the onset of capitalism, many large clothing factories went bankrupt not being able to cope with the new economic reality.

Apart from the bankruptcy of the state-owned giants, the transformation into market economy brought with it an inflow of orders from abroad. They were taken up by the factories that survived the political transformation. Most of them were smaller private-owned factories, some founded after the collapse of the socialist state-owned giants. They switched from state contracts to international ones, often with the world best known clothing manufacturers, including sportswear producers. Soon about 80% of Polish clothing production was done in the OPT system (Outward Processing Trade), which consists in manufacturing apparel for foreign brands with the foreign company label only. Clothes are made according to the company's design and from materials supplied by it.

This form of activity let many factories survive, it did not let them develop, though. They became dependent on foreign clients, did not build their own development strategies, their own products, brands, designs, distribution channels etc.

Over time, however, Poland has become too expensive to be a competitive contractor in the OPT system – it lost in competition mostly with Asian countries where production is cheaper, mainly because of low labour costs. The OPT in Poland is decreasing year after year. Cheaper contractors from Asia are developing and offering products of better and better quality at extremely low prices, although often at the cost of inhumane working conditions. Polish producers cannot keep up with this competition despite lowering the costs of production. They get orders for more demanding products or from smaller companies that care more about faster and cheaper delivery than mass production, but the OPT is no longer a long-term solution for the Polish clothing industry.

The gradual loss of foreign contracts results from the development of Polish economy. Due to Poland's ongoing economic growth, EU accession and the related increase of production costs and requirements concerning labour standards, more and more often it is the contractors from other countries that win international companies' orders previously directed to Poland.

European integration has also had a profound impact on local Polish manufacturers producing goods for the Polish market. Competitive goods have become much more accessible – the Association Agreement waived customs in trading with the EU in 1998 and fully opened the Polish market for foreign competition within the free trade zone since 1999. What was also important was the final opening of the European Union market for products of Asian countries in 2005.

The accession of 2004, however, has also helped develop export from Poland to the other EU countries. It was also a chance for the growth of small and medium-sized enterprises, and these are exactly the companies that form the basis of the Polish clothing industry.

Some Polish companies were quick to find their way in the new reality and copied the system of operation employed by international manufacturers. They develop their own brands, design clothes and create distribution networks in Poland, transferring the production to cheaper countries, mainly to Asia. Many have had much success with this. None of these companies is a typical sportswear brand. There is, however, a developing trend of outdoor clothing, i.e. clothes for mountain sports, skiing etc. This market segment is dominated by Polish companies. They follow the EU strategy for clothing industry development that assumes its transformation from labour-intensive to research-intensive. As a member of the European Union, Poland should pursue this

[1] M. Malinowska- Olszowy, Strategia marki – analiza rynku odzieży sportowej na Jednolitym Rynku Europejskim, (Brand strategy – an analysis of the sportswear market on the Single European Market) – unpublished doctoral dissertation, Department of World Economy and Textiles Marketing. Technical Univeristy of Lodz, Łódź 2007.

strategy. Such changes are supported with EU funds target also at producers.[2] So far, though, they have not always been effectively used. Many Polish producers remain isolated and are not interested in the reforming programs offered, financed with EU funds. Used to living from hand to mouth, they do not invest in the development of their companies (market research, developing own products, promotion, training for employees etc.) They operate as though they were still in the 1990s, working under contracts for foreign clients. Since it is estimated, that this system will not further develop in Poland, Left by foreign contracting companies, small Polish producers have to start from scratch with developing their businesses. Unfortunately, many of them are doomed to failure[3].

Employment

The situation of workers employed in the clothing industry, the prevailing majority of whom are women, is of course closely connected with the situation of producers and the development prospects of the factories the employees work in. What happens to them is a consequence of the changes taking place in the clothing industry.

With the political system changes of the early 1990s, the myth of Łódź collapsed – it had been called "the city of women", the promised land of seamstresses and textile workers. Many of them became unemployed or were forced to take jobs in very hard conditions. Since the early 1990s, employment in this sector has been dropping steadily. For example, between 2000 and 2005 there was a 35% decrease in the employment, which means 40,000 people were laid off[4]. Also, the situation of textile workers was very difficult because their industry had not been given such generous aid and transition programs as for instance the miners had. Additionally, the last few years were the time of the highest unemployment rate in Poland, especially among women (up to 20%).

Such a situation had its ramifications. Seamstresses' working conditions were becoming worse and worse, and the workers accepted it, since they had no choice. They were motivated by the fear of unemployment.

Today, the situation is somewhat different. Unemployment rates are down, and seamstresses are in short supply. The older ones are retiring and there are hardly any young ones. Textile schools are deserted and often closed down. Young people choose different jobs with better prospects, or emigration. What puts them off taking a job in clothes manufacturing is lack of perspectives and very low wages.

Is there a solution to this problem? The simplest thing to do would be to raise wages in this sector but often it is not possible. Sometimes, therefore, seamstresses work "off the books" - for manufacturers who do not pay social security premiums and taxes, where they can earn twice as much as if they were legally employed. At times they take up such jobs while on sick, holiday or maternity leave in other factories – to have some social security and earn better money at the same time[5].

Some manufacturers have come up with the idea of hiring seamstresses from abroad, from Ukraine or even China.[6] These workers accept lower wages, still attractive for them. Manufacturers want to develop these procedures and are trying to convince the Ministry of Labour and Social Policy to put the seamstress profession on the list of occupations desirable in Poland so that immigrants from the East could do this job it legally[7].

However, all these are examples of short-term, immediate solutions. More long-term actions should be taken to improve the situation of the clothing industry workers. Such actions have been planned and partially completed under the governmental Strategy for Light Industry 2000 - 2007. They focus on toning down the effects of industry restructuring, especially on re-skilling workers. The document does not elaborate, though, on the situation of workers still employed in the industry[8].

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[2] A. Rogut, Strategia przekształceń przemysłu włókienniczo- odzieżowego z pracochłonnego w nauko-chłonny, (From labour-intensive to reasearch-intensive: the strategy for the textile and clothing industry transformation) SWSPiZ, Łódź 2007

[3] A. Stec, Tak chiński krawiec kraje, jak w Polsce się sprzedaje, Gazeta Wyborcza, 34, 10.02.2003

[4] Analiza wyników ekonomiczno- finansowych oraz obrotów handlu zagranicznego w przemysłu lekkiego w latach 2000- 2005 (An analysis of economic and financial results, and foreign trade turnover of the light industry 2000 – 2005), Ministry of Economy, www.mg.gov.pl

[5] P. Brzózka, Szwaczki Anno Domini 2006: wyścig pracy (kapitalistycznej), Dziennik Łódzki, 11.03.2006

[6] A. Dziedzic, Szukali szwaczek w Polsce, w końcu przywieźli je z Chin, Wirtualna Polska: www.praca.wp.pl , 01.10.2007.

[7] J. Blewąska, M. Masłowski, Dajcie nam szwaczki z Ukrainy!, Gazeta Wyborcza – Łódź, 30.09.20066

[8] Ocena wdrożenia działań wynikających z dokumentu:„Strategia dla przemysłu lekkiego na lata 2000-2007" (An evaluation of the implemementations of actions resultinf from the document: „Startegy for the light industry 200 – 2007"), Ministry of Economy, Warszawa 2006, www.mg.gov.pl

Sportswear manufacturing

It is difficult to assess the situation in sportswear production in Poland, as the is hardly any data or analysis available on this sector. None of the statistics published are differentiating sportswear production. Limited sources which are available show, however, that the situation with sportswear manufacturing in Poland is similar to this in the entire clothing industry. Sportswear and athletic footwear is produced in various factories – some manufacture it for the Polish market, others are contracted by foreign companies. Some Polish factories used to make sportswear for the best known brands like Adidas, Puma and Kappa, before these corporations shifted their production to Asia. Today, some manufacturers claim that this production begins to return to Poland and they are counting again on contracts with the world giants, but sportswear market specialists do not confirm these opinions. They believe the trend of moving production to cheaper countries, mainly to the East, will continue[9]. This is a strategy adopted also by the Polish outdoor brands that succeeded in making it on the market and are now recognizable by consumers, for example Bergson or Alpinus and Campus (brands owned by the company Euromark), but also others. They all locate their production - or at lest its final stage – in Asian countries.

In Poland, sportswear is produced by some 100 factories. Most of them are companies employing up to 50 people, or smaller. Almost all are private enterprises with a predominance of Polish capital. The largest share of their production output is winter and recreation (biking, fitness) sportswear, and the smallest is diving and surfing garment.

More sportswear is exported from than imported to Poland. We export mostly skiwear and swimwear, as well as training wear. 90% of exports go to the EU countries, Germany in particular, but also to Denmark and Italy[10].

The value of sportswear import is almost three times lower. Poland ship it mainly form Asian countries, where it is produced, especially from China. One fourth of imports come from the EU: Italy, Germany and the Czech Republic[11].

It is important to bear in mind that it is the OPT production, i.e. delivering foreign contracts, that accounts for a large part of exports. Today, however, Polish factories working in this system supply mostly smaller companies or sports clubs from the "old" EU countries.

Some manufacturers try to make sportswear under their own brand for the Polish market. Most of these brands are more recognizable locally than nationally or internationally. Polish producers do not take up the fight with sportswear giants and it is hard to blame them... They cannot equal them in resources, technological advancement, state-of-the-art solutions, projects, publicity etc. If at the same time they lose their significance as subcontractors to major sportswear companies, what kind of future awaits Polish sportswear manufacturers?

Prospects for the future

Polish clothing industry, including sportswear manufacturing, must undergo further restructuring and modernization. It is necessary to implement strategies suitable for the situation in Poland. The future of Polish manufacturers is to develop their own products and brands (new fabrics and designs, trend following and trend setting). There is a need to modernize the production process, invest in new technologies, improve quality, develop distribution networks, a need for effective marketing and promotion, and above all, to find one's niche both in the Polish and foreign market[12].

Big sportswear companies do not respond to the needs of niche customers. And there are quite a few niches in the sector of sportswear and athletic footwear. The market is segmented according to sports disciplines. It is these specific needs that Polish producers should respond to, offering high quality innovative products. Individualized offers are mostly provided by small and medium-sized enterprises that dominate this industry in Poland. Niche customers have complex needs so they need a special offer targeted at them. Such customers are also willing to pay more for a product that meets their expectations[13].

Manufacturers could use the help of experts in developing specialized products. Unfortunately, lack of constant cooperation between manufacturers and scientific research environments is one of the key problems of the light industry. It stands a chance to grow if it has suitable resources developed throughout the years (skilled engineering, technology and scientific staff, designers, exhibition institutions etc.) What can make such cooperation easier is the fact that most of the clothing industry, as well as the majority of the related institutions, is located in Łódź and its surroundings, and thus can be easily linked together. Cooperation of manufacturers and scientists is also practiced in other EU countries and supported by EU funds so it is certainly worth developing. Importantly, the improved prospects of producers would have a positive impact on the situation of workers employed to make sportswear[14].

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[9] J. Blewąska, M. Masłowski, Dajcie nam szwaczki z Ukrainy!, Gazeta Wyborcza – Łódź, 30.09.2006

[10] Branża sportowa – analiza rynku, Trade Bizz.pl, www.tradebizz.pl

[11] Branża sportowa – analiza rynku, Trade Bizz.pl, www.tradebizz.pl

[12] Stefaniak, Przemysł i rynek odzieżowy w Polsce, Gazeta Prawna - Gospodarka nr 91 (1456), 11.05.2005

[13] Malinowska- Olszowy, Strategia marki – analiza rynku odzieży sportowej na Jednolitym Rynku Europejskim, (Brand strategy – an analysis of the sportswear market on the Single European Market) – unpublished doctoral dissertation, Department of World Economy and Textiles Marketing. Technical Univeristy of Lodz, Łódź 2007.

[14] I. Krucińska, Diagnoza potencjału jednostek badawczo- rozwojowych i procesu komercjalizacji badań (A diagnosis of the potential of research and development agencies and the research commercialization process), SWSPiZ, Łódź 2007

The competitiveness of Polish producers could also be increased by different certificates for the clothing produced. Product quality and safety certificates, and perhaps also appropriate working conditions in good quality clothing production, could become an asset of Polish brands. Such goods are in a growing demand by consumers from the most developed countries, who take into account social and environmental issues in their purchasing decisions. They are becoming more and more reluctant to buy goods from Asia where the basic workers' rights are violated. It is very likely that they would be more willing to buy "ethical" products from Poland, even if it meant slightly higher prices. Undoubtedly, it is a still largely unused group of niche customers.

The foregoing analysis presents a perspective of academics, officials and economists in the first place. What about the manufacturers themselves? What do all these changes mean for employees? What is their perspective?

In their own view: Results of interviews with manufacturers

From June to September 2007 KARAT interviewed management representatives of 10 factories producing sportswear in Poland for the Polish market, 6 international companies manufacturing sportswear with their representative offices in Poland, and 5 big Polish brands. Only Polish factories producing for the Polish market agreed to participate in detailed survey. International corporations refused to answer questions about the manufacturing of their products and so did big Polish manufacturers who are know from other sources to locate their production in Asia.

Production, sales and customers

The companies that agreed to be surveyed were micro (up to 10 employees), small (10-49 employees) and medium-sized (50-250 employees) enterprises. Most of them manufacture sportswear under their own brands, two are contracted to other companies. None of the companies surveyed commissions production from other contractors. A small proportion of the factories surveyed produces goods for export, only three produce goods both for export and domestic market, the majority limits their production just to the Polish market. None of the companies, however, could assess their share of the Polish market because the factories do not conduct such research, even if they manufacture goods under their own brand. The owners are convinced their share is minimal.

The companies surveyed do not do their own marketing nor do they invest in advertising and distribution. Often, especially in small factories, the business owner distributes the products, sometimes hiring sales representatives. Most of the products are supplied to small sports and clothes shops. Three of the manufacturers surveyed have their own retail outlets, they claim, however, that keeping your own outlet is not always profitable.

The most desirable target group for sportswear manufacturers are young and active adults in their 20s and 30s, who have enough money to buy special sportswear and unlike teenagers are loyal to the brand. These products are bought also by companies who provide their employees with clothes with company's logo (not work clothes but gadgets, bonuses for employees).

Competitors

The research shows that the surveyed factories' competitors are mainly large Polish companies that shifted part of their production to the Eastern and Asian market. Only one of the surveyed companies mentioned among its competitors small Polish factories and cheap Asian brands. Competitors are more advanced technologically, more popular, have better quality products and more recognizable brands than the surveyed factories. Only one respondent mentioned prices as an aspect of competitiveness.

Polish factories try to compete by lowering the prices of their products and making their production flexible so they can often change designs of goods produced.

When compared to international corporations, such as Adidas, Nike or Puma, they indicate low prices of their products as a means to compete with them. Two of the companies surveyed are convinced that the quality of their products does not diverge from the quality of products made by international brands. Most of the surveyed manufacturers feel, however, that they are driven out of the market and are not able to keep up with the international giants. *"We are doing bad, we are being driven out of the market, our growth is lower and lower."*

Employees

The factories surveyed employ from 4 to 100 workers, and only two manufacturers out of eight employ more than 50 people. One of the companies refused to answer the question about employment. In all the factories a vast majority of employees are women; men usually are just 1-2 executives or senior production staff members. Only in the biggest factories there is a formal division of duties among employees. In smaller ones manufacturing workers often do administrative tasks, too, and executives or owners work at the same time as sales representatives or office staff.

Employers declare that sometimes workers quit their jobs to search for better conditions, higher wages and more flexible forms of employment. In two factories, the answer to the question whether employees often quit was no. Employers do not lay people off because there is no one to replace them with, and some employees keep their jobs because they are approaching retirement age or are aware they will not be able to find anything better any more.

All the employers agree that it is hard to find new employees: *"People are not willing to work, they prefer to go on the dole and work off the books." "There are no professional schools, the wages are low." "There are no prospects for good earnings in this trade." "To sell the goods, they have to be cheap, and workers don't want to work for low wages." "There are no young people who want to work as seamstresses."* Employers point out the lack of educated, trained, young workers – there are no schools for them and people are reluctant to study being aware that they will not earn much as seamstresses, and that the job is unsteady, hard and unrewarding.

Employers declare that the monthly remuneration in manufacturing is from 1000 up to 1800 zlotys[15]. At the same time, they claim that sometimes they pay employees more than their work is actually worth since the employees are unable to get the assigned workload done.

"I am raising the wages a little but the worker's expectations are too high. To stay on the market (e.g. German market), I have to sell products for imposed prices. I cannot cut spending on materials or raise the price of the product..."

There are no trade unions in any of the companies surveyed: *"There is none, why would there be one in such a small factory! It's nonsense! What for, so they can tell me what wages I should pay them and when to give them some leave?"* (an owner of a company employing 65-100 people). This is one of most extreme views in majority of cases the employers claim that their firm is too small for the trade unions to be established or that there is no need of such workers' organization as the "staff is like family" and therefore, according to employers, no official structures are necessary.

None of the companies surveyed has a CSR (Corporate Social Responsibility) strategy, mostly because the factories' owners do not have the knowledge to create such strategies. Many of them never heard of CSR.

Development Prospects

Some manufacturers evaded questions about prospects whatsoever. Only two companies declared a willingness to develop and even mentioned transformation plans – investments in machines and raw materials, increase of production output, new hires. Most manufacturers, however, cannot see opportunities for growth and do not make plans for the future - they live from hand to mouth, manufacturing what they get an order for, or declare they are in financial straits and cannot see the future. One of the companies intends to close down because there is nobody who would like to run the factory after the owner retires.

Lack of prospects does not make the factories invest in restructuring or hire new employees. The manufacturers do not plan to shift production beyond Poland to the countries with cheaper labour.

„Others may shift production, they are young and entrepreneurial, they produce more, and for me it doesn't pay, I just want to get by until retirement, because the kids don't want to take over, they went on to study."

Only the largest of the surveyed companies said yes when asked about production shifting, not giving any details though. It seems they are considering such a solution and have not actually decided to do it.

Evaluation of the Polish sportswear market

The biggest sportswear manufacturers mentioned by the people surveyed include the following brands: Alpinus, HiMountain, Bergson, Active Wear, Teta, Bodella, Twain, Rebbeca, Milo, Campus.

In the opinion of those surveyed, the situation on the Polish market is quite clear – there are a few large factories that have money for advertising, imports, sales representatives, and can cut costs. The rest are small manufacturers who live from hand to mouth

[15] This amount is approximately: 270-480 euro. As interviews with workers employed in clothes manufacturing show, their average monthly wages are 700-1200 zlotys (190 – 300 euro) net., much lower than the amounts given by the producers.

and have difficulties with staying on the market. The manufacturers believe the market situation is getting worse, or remains the same.

Business owners cannot say much about the prospects for the industry development nor can they estimate what the situation will be like in a few years. Only one of the respondents made a diagnosis that in a few years' time small factories will disappear driven out by low-cost competitors producing in countries where labour is cheap. In his opinion, factories manufacturing clothes in Poland will rather make them for foreign brands than under their own brands.

Conclusion

In the Polish clothing industry one can observe a clear-cut division into large enterprises that own recognizable, prospering brands, and small companies that have problems selling their products and count on reliable customers or small-scale production.

Most of the big sportswear companies produce the so-called outdoor clothing, i.e. garments for hiking, skiing, sailing or biking. It is a well developing segment of the industry that requires technologically advanced materials, and thus also knowledge-based production technology and highly skilled staff for design, market research and marketing. Most of large enterprises shifted the last production stage, or at least part of it, to factories located in the countries where labour is cheap. What is quite telling, none of the big Polish companies agreed to be surveyed.

On the other extreme, there are small manufacturing factories with their own brands, yet producing goods for a limited number of customers. These are small and micro enterprises employing from several up to twenty people. The owners hardly ever do market research or plan their factory's development, and seem to live from hand to mouth, often making clothing for other, mainly western, companies.

A serious problem of the Polish clothing sector, often pointed out by entrepreneurs, is the shortage of workers. Manufacturers frequently mention problems with hiring new people, giving different reasons: above all a shortage of educated or trained workers, lack of schools for seamstresses, no vocational schools or technical secondary schools educating staff to work in manufacturing plants. There are not many candidates for this profession, either. This is largely due to low wages in the industry, lack of prospects, very hard and unstable work.

From FABOS to Krossport, or how workers of state-owned factory became manufacturers of sports shoes

The legendary FABOS

The FABOS athletic footwear factory operated continuously since 1944. For a very long time it was the only manufacturer of ski footwear and ice skates one of best know sport footwear manufacturers in Poland. It is in ski boots of this brand that Wojciech Fortuna, the ski jumping Olympic champion from Sapporo 1972, practised. It is in FABOS football shoes that Kazimierz Deyna won a gold medal and a became a top scorer during the Olympics in Munich. It is in hiking boots made in this factory that Polish Himalayan mountaineers were the first ever to climb Mount Everest in winter in 1980. Not surprisingly, FABOS became a legend in Poland.

Nike and Adidas in Krosno

As a large, state-owned factory, FABOS did not avoid problems related to the transformation to market economy. As early as in the 1970s, the factory *showed a tendency to go bankrupt*. The situation got worse in the 1980s, and in the 1990s it was disastrous. However, important customers showed up.

Since the early 1990s, the factory delivered long-term contracts for athletic footwear manufacturing for such brands as Diadora (cycling shoes), Adidas and Nike. FABOS revived, not for long though... Big companies soon concluded that shifting production to Asia would be more profitable and this is what they did. They left, leaving FABOS with its problems unsolved.

In 1998 FABOS's bankruptcy was finally declared. At that moment, some 1500 people worked at the factory. Most of them was laid off.

"After Fabos went bankrupt, people were left without work, some had to reskill, some retired, others went on the dole to wait for retirement" - one of the FABOS employees at that time recalls.

Attempts at reactivation

For five years the downsized staff worked for the trustee in bankruptcy, with no prospects for the future, though. At the same time the municipality of Krosno, that took over the real estate of the bankrupt factory, was looking for an investor interested in resurrecting the well-known brand and resuming production. This process was supported by the local press and the customers who remembered the past glory of the company. To no avail.

FABOS is dead, long live Krossport

In July 2003, three former employees of FABOS founded a private partnership called Krossport. At first they leased part of the equipment and facilities from the municipality and started manufacturing athletic footwear and sports balls. Soon Krossport bought the leased real estate. Since then the FABOS brand and company no longer exists. The new company, Krossport, employed just 32 people, former FABOS workers. The staff operates manufacturing stations (cutting, sewing, assembly) and auxiliary stations (packing etc.)

Krossport manufactures and sells its products under the Krossport brand. The products go mainly onto the Polish market and some are exported to the East, chiefly to Ukraine.

We haven't tried to cooperate with western brands because we know that we could only incur losses. We are the only Polish manufacturer of athletic footwear - say the Krossport's owners.

Any problems?

Materials coming from Europe are not very attractive. Manufacturers of state-of-the-art materials moved to Asia as well, to be close to the manufacturers of readymade gear.

Generally speaking, the owners of Krossport describe the company's situation as *satisfactory*:

We have regular buyers. The company's situation will be decided by the market. At least it won't be worse.

They have a far less positive opinion about the future of the Polish sporting goods industry in general. According to them, all reputed brands manufacture footwear in Asia (China, Vietnam and India), and balls in Pakistan. All over the EU there is a trend to shift production to Asia. It is the only way for companies to keep up competitive prices of their products.

The Asian tiger devoured domestic manufacturers. There are no prospects for domestic production, it is doomed to failure[16].

Working conditions in sportswear manufacturing: Results of interviews with employees

We often hear that Chinese, Thai or Bengalese workers are exploited in garment factories. A question arises: what impact does it have on the situation of seamstresses in Łódź? To answer it briefly: a major one.

Asian factories are attractive to customers because of low costs of order fulfilment. This is made possible by Asia's most powerful asset – cheap labour, i.e. millions of seamstresses, often very young, working day and night for starvation wages.

Many of Polish clothes manufacturing factories are small enterprises accepting orders from foreign companies. They compete for these orders with factories from other countries, including Asian states. Even if Polish manufacturers produce goods under their own brand, they cannot avoid Asian competitors because their products meet this competition on the market.

Of course, there are many upsides to Polish products: good quality, short delivery dates, a possibility to quickly change the design being manufactured. But it is the price that continues to matter most on the clothing market. Products must be competitive. That is why an average seamstress in Poland earns approximately 700-900 zlotys[17] net a month and hardly ever works 8 hours a day, 5 days a week – she works much longer.

For several years now, KARAT has been monitoring the working conditions of seamstresses, cooperating with various international organizations concerned with workers' rights and consumer awareness, in particular the Clean Clothes Campaign[18].

The research conducted by KARAT so far shows that the situation in factories manufacturing clothing in Poland is quite diversified. Usually, however, the following picture of clothes making in Poland emerged: nearly all workers in clothes manufacturing are women, like in supermarkets or hospitals. Unfortunately, working in women-dominated professions generally means low wages and hard conditions, and seamstresses are just the right example.

They usually work in small factories that live from hand to mouth, without any long-term strategy, making clothes when there are orders placed (usually from abroad), they are on piecework, i.e. seamstresses are paid for each piece of clothing made and production limits are set in such a way that during 8 hours 5 days a week a minimum workload can be done, and not always so. For this minimum, a minimum Polish salary is paid: about 700 zlotys net[19]. Usually seamstresses have to work overtime, on Saturdays or holidays. Of-

[16] Based on interviews with one of Krossport's owners, Krosno municipality officials, and websites and Internet publications:http://fabos.rze.pl/wstep.htm, http://www.krossport.pl/ Krzanowski, Fabos – reaktywacja, Krosno24.pl, 30.09.2003, FABOS was mentioned in Super Nowości on 09.12.2003 and on 06.08.2003

[17] Approximately 190-270 euro.

[18] Acampaign of NGOs, workers and consumers for the improvement of working conditions in the global clothing industry. More information: www.cleanclothes.org

[19] Approximately 190 euro.

ten they cannot be sure, however, that they will be paid for these additional hours with additional remuneration. Seamstresses have also troubles getting leave of absence or sick leave. Sometimes mothers returning to work after maternity leave are offered a choice: to be laid off or to work under a mandate contract. The factories that are not planning its future do not invest in maintaining sanitary or safety standards, so accidents often happen and workers get ill. These cases are not reported to the National Labour Inspectorate, because after on-site inspection it could close down the factory and there would be no work at all. Since employment is not secure anyway, workers often decide to work "off the books" – they can earn more because the employer does not pay taxes or social security premiums. Some seamstresses go for it, some even get sick or holiday leave in one factory to work in another one "off the books" at the same time. They do what they can...[20]

Results of research in sportswear manufacturing factories

In 2007, in relation to the *"Fair Play in sporting goods production"*[21] project pursued by KARAT in cooperation with other organizations, we focused on sportswear manufacturing, interviewing workers of this industry. In accordance with the strategy adopted by the PlayFair 2008 campaign[22], we assume that such narrowing of the subject scope results in a more thorough analysis and permits us to refer directly to specific products, known to every consumer.

This time workers were interviewed in only three factories, the main reason for this being the fact that the interviews aimed at portraying the situation of employees in different types of factories of this sector rather than at quantity survey of working conditions in the sportswear industry. We were also interested in transformation in the sector after the best known world manufacturers had withdrawn from Poland. The factories selected to be surveyed are: a state-owned plant that used to manufacture goods for Puma and Adidas, a private company that is an example of a system of operation typical so far for Polish clothing factories, i.e. making clothes in the OPT[23] system for foreign customers only that used to include Kappa, and finally, the third one – a private factory making mostly sportswear under its own brand, for the Polish market.

The factories surveyed

Factory 1 is still a state-owned enterprise that manufactures e.g. fabrics for the production of sportswear. Adidas and Puma used to invest here, today they are gone but the factory continues to produce goods for the Polish market of for exports, mainly to the East. The factory is located in Łódź and was founded in 1972 as a state-owned enterprise. Since 1999 it has been a joint-stock company, owned almost entirely by the State Treasury. The factory employs about 500 people.

It manufactures mainly fabrics, such as biostatic breathable warmth-absorbing fabric, thermoactive fabrics and dry-release breathable fabric used in professional sports and active recreation. The factory's products include sportswear.

Wishing to avoid the threat of Asian competitors, the company is oriented towards demanding customers and non-standard high-tech fabrics. It has several retail outlets and exports its fabrics abroad. Polish factories also produce sportswear based on these fabrics, e.g. Factory 3 featured in this survey.

Seven people working at Factory 1, mostly women, took part in KARAT's survey. Their age varied and they have usually had a secondary technical-textile education. The older women have been working here even for 30 years, and the youngest workers surveyed – 3 years. The scope of duties of the surveyed is diversified, too: knitter, quality controller, quality grading, ironing, process line operator (most of the surveyed).

Factory 2 is a different type of enterprise. Here clothes are manufactured only for foreign brands, in the past – for the well known Kappa brand and for German sports clubs, and today for well known companies from England or Denmark.

The factory employs around 60 people, half of whom works in manufacturing. The plant is located near Łódź. It is a small, neat, modern building. The production hall, where seamstresses work, is large, light and spacious. In this respect (cleanness, modernity, hygiene), working conditions are here definitely the best out of all the factories we surveyed.

[20] J. Szabuńko, A. Seibert, A. Kamińska, Warunki pracy kobiet w polskim przemyśle odzieżowym. Wyniki badań 2005, Warszawa 2005

[21] More information about the project in the introduction to this publication and on the website: www.womenslabour.org/fairplay , www.kobietypraca.org/fairplay

[22] International campaign pursued in the lead up to the Olympic Games, appealing for the respect for Olympic values, the fair pair principle in particular, also with reference to workers employed in sporting goods production. KARAT is a supporter of the PlayFair2008 campaign. More: www.playfair2008.org.

[20] OPT - Otward Processing Trade, a system of manufacturing clothes foreign brands, in which only the foreign company's label is put on the product. Clothes are made according to this company's design and from materials it supplies.

Most of the people employed in the factory are women, there are but three men. The women working here were more open to interviews than those working in Łódź. 6 employees (women) participated in the survey, and 4 agreed for in-depth interviews going beyond the subject matter related to their work in this factory. The youngest of our interviewees was 24, the oldest was 50. Most of the employees in this factory have had a technical secondary education connected with clothing or leather industry. The women we talked to have worked here for 2 to 11 year and their posts include: seamstress, quality controller and production manager.

Factory 3 is a small plant in Łódź manufacturing clothes, mostly sportswear, under its own brand, quite well known. Their manufactures are "fitness clothes" for the most part, mainly for women. On occasions, though, the factory delivers contracts for well known foreign fashion catalogue companies (Bonprix, Otto) making dresses, suits and coats.

There are about 50 people working at the factory, 30-35 out of them in manufacturing. Most of the employees are women, there is only one male seamster and a few men working as cutters. Factory 3 is a family business, many seamstresses have worked here since it was founded and some of them are friends or relatives of the owners.

The company has its retail outlets in Łódź as well as in several other towns. Its products are also sold in clothes and sports shops.

In this factory we talked to 6 women employees aged 21 to 52. Most of them have had secondary education, usually industry-related. They have worked here for several years, and some have been with the company since its foundation over a dozen years ago. Most of the women we interviewed are seamstresses but there are also cutters and employees working in the finishing room doing quality grading, sorting and ironing.

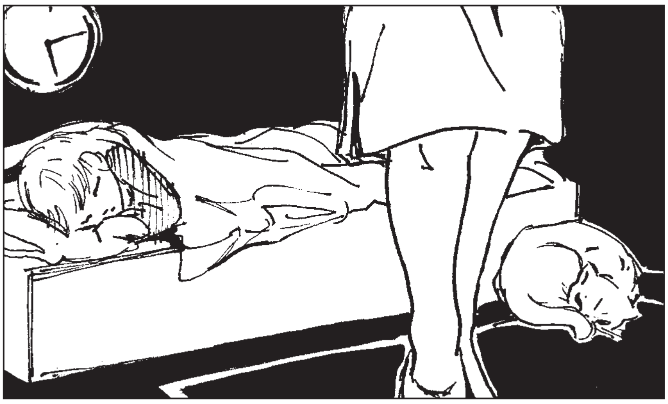
How is the research conducted?

The research conducted by KARAT includes interviews with the workers. It is the best way to obtain reliable information about work done in the factory. If possible, the results of interviews with employees are complemented with interviews with employers. We managed to do it in the case of Factories 2 and 3.

The way of employee interviewing is a proven research method used by KARAT as well as other organizations working with the Clean Clothes Campaign. The interviews are anonymous. They take place off-site, at a place selected by the workers interviewed. The questions asked are meant to check whether principal labour standards, formulated in the International Labour Organization conventions and most frequently violated in the clothing industry, are observed in their factories. These standards are:

- No forced labour (ILO Conventions 29 and 105)
- No discrimination in respect of employment (ILO Conventions 100 and 111)
- No child labour (ILO Conventions 138 and 182)
- Freedom of association and the right to bargain collectively (ILO Conventions 87 and 98)
- No excessive working hours (ILO Convention 1)
- Living (minimum) wage (ILO Conventions 26 and 131 and the Universal Declaration of Human Rights)
- Employment safety and legality
- Occupational health and safety - decent working conditions (ILO Convention 155)

All the research of working conditions in clothing industry in Poland conducted so far shows that the ban on child labour is fully observed. This time we can say that in the factories we surveyed there is no forced labour - so far seamstresses have considered overtime they could not refuse as such. Here is how the other standards are observed:



Labour standards observance

◆ *Working hours*

Overtime, in particular unpaid overtime, is one of the major problems of workers employed in the clothing industry, including the sportswear sector. It is a consequence of the seamstresses' usual system of work – the so-called piecework. In this system, working hours and remuneration depend on the quantity of goods produced. Usually, there are workload norms set to be completed by seamstresses in regular working time, which is not always possible, as the norms are sometimes too high. Thus, seamstresses must stay overtime to complete their work. They may also work overtime to earn some extra money because the wages they receive for the workload done during the regular 8 hours is by no means a living wage, hence it becomes necessary to work overtime everyday, to work on Saturdays or even on Sundays.

In both private Factories 2 and 3, when asked about working hours, the employees tend to answer:

"In theory, it is 5 days a week, 8 hours a day, but it is different in reality".

The reality is they work about 10 hours a day. Usually, Saturdays are also working days. There are no night shifts here, though, unlike in the state-owned Factory 1, where people work 5 days a week, 8 hours a day but for the most jobs there are three shifts, including night shifts.

„We change shifts every three weeks. There are three shifts: 5.30 – 13.30, 13.30 – 21.30, 21.30 - 5.30."

During the entire day, workers are entitled to one, sometimes two usually 15-minute breaks:

„There may be two breaks but there is no appointed time for them. We have breakfast in the morning and we go on to sew, we're on piecework, so everyone is pressed for time."

In each of the three factories surveyed, the situation with obtaining leave is different. In the state-owned Factory 1, leave is contingent on the plant's work cycle. In the summer, the manufacturing stops for two weeks for technical reasons and everyone must use their leave time. It is fully paid.

In Factory 3 there are no problems with taking leave, contrary to Factory 2, where most of the employees do not use the leave they are entitled to.

◆ *Remuneration*

Even if the conditions in clothes manufacturing factories have improved in other aspects in recent years, wages are still a huge problem in the clothing industry. Seamstresses' remuneration is almost always based on piecework, i.e. the quantity of goods produced. Workers doing other jobs, such as cutters, packers, embroiderers, are paid per hour of work. In any case, however, permanent wages are usually the minimum remuneration of 700 zlotys[24] net a month. This is an amount paid to seamstresses on piecework for getting the assigned workload done. They earn extra money in overtime. Usually, their average monthly remuneration is about 1000 – 1300 zlotys net[25] (including overtime).

Of course, in each of the factories we surveyed the earnings were different. All of the workers we interviewed, however, claimed that wages in their factory are too low. They tried to rationalize this and the theories they came up with differed depending on the enterprise type. The employees of the state-owned Factory 1 said:

„The wages are low but I know what it's like at a private factory, you have to work 12 hours a day there, it's calmer here."

In Factory 3 low wages are the only important problem pointed out by the employees:

"Everything is OK, it's just that it's not too well paid. The factory is not bad at all, if you compare it to others, you can even say it's good. The atmosphere is good. I'm just happy that the company pays up, because different things happen. In other factories people are not paid on time."

In Factory 2, most of the workers claimed that their wages are lower than elsewhere. They are right.

"The earnings differ, often you earn the lowest wages, 900 zlotys a month, but you know, it's 900[26] for the books so then it's like 600[27]. Some people are paid per hour. And it's 3.50 zlotys an hour - 8 hours for 3.50 and 2 hours for 4 zlotys, and on Saturdays it's 4 zlotys, I think. 600 is what most people get. Sometimes a little more, up to 1000[28]."

The very low wages in this factory are the reason for a great turnover of employees.

All the workers interviewed, from all the factories, also agree that they would not be able to support themselves on their wages only. They would need much more to survive. They mention sums from 1800 to 2500 zlotys[29] per month. Their additional means of support are provided by their parents, their husband's, their son's salary etc.

Most of the women surveyed confirmed that their remuneration are usually paid on time, that they are informed about the way the wages are calculated and that this information is comprehensible. Unfortunately, some workers claim they do not always receive remuneration for all the hours they have worked.

[24] Approximately 190 euro.
[25] Approximately 270-350 euro.
[26] Approximately 243 euro.
[27] Approximately 165 euro.
[28] Approximately 270 euro.
[29] Approximately 480-670 euro.

◆ *Freedom of association, collective bargaining and labour-management relations*

Trade unions are rather rare in sportswear factories, and they usually exist in state-owned plants. Our research confirms this tendency.

Out of the three surveyed sportswear factories only the state-owned Factory 1 has a trade union. Unfortunately, workers say it exists only on paper. None of the interviewed workers admits to be a member of a trade union, no one knows what their function is or whether they fulfil their tasks.

Most respondents claim that they have no interest in the matter. One female worker has more explicit views:

Yes, trade unions exist, but they are a joke (...) generally they don't do anything, and they will not, because they will be afraid to loose their cosy jobs. All they do is give out flowers on International Women's Day, but they collect money to buy them from us".

Our attempts to contact trade unions in this factory confirm their weak position. The representative would only talk to us if the CEO gave his consent.

In the two other investigated sites there are no trade unions at all. In Factory 3 it is probably because the plant is a small family business with a stable female workforce employed for years, where no one sees the need for a trade union. In Factory 3 it is the CEO who claims that a trade union is not needed.

Almost all workers admit, however, that in the course of their day-to-day work they have good, or at least neutral relations with their employers and/or direct superiors.

They do not know, however, whether they have a collective bargaining agreement with their employer or they are aware no such agreement has ever been signed. They also claim that in the last 5 years there were no cases of strikes or conflicts with employers.

Interviews also show that both male and female workers are used to the hard work in the industry and that their demands towards observing labour rights decrease with time. They do not believe in trade unions. Since in many cases they are employed in companies that have no clearly defined long-term strategies, the workers don't see their future with those companies. They don't identify themselves with their employer, so they are reluctant to engage in activities that would improve the situation in their factory. Usually they would rather transfer to another factory or "wait it out" until they can retire. Even when workers can identify their employment-related problems (usually low wages), they see no ways of solving them. It seems that this would be a perfect task for trade unions.

Another strategy employed by companies to address the issues of guaranteeing employment rights is Corporate Social Responsibility (SCR), but the workers in the surveyed factories were not aware of any CSR strategies employed by their companies. They do not know what CSR is.

◆ *OHS*

There were no serious complaints about OHS conditions in any of the surveyed factories, though the conditions differ depending on facility. In Factory 1 workers have access to first aid kits, earplugs and face protection, if needed. Not all workers chose to use the protective equipment.

A large number of employees complains about health problems attributable to their work (mainly hernia and noise exposure), and they admit that the factory doesn't offer any assistance in handling these ailments. They mention that the facility is inspected for observing OHS regulations.

In Factory 2 workers do not eagerly speak about OHS related issues. The illumination and temperature of the workplace are suitable, though there is no protective equipment (earplugs etc.).

In Factory 3 the workers do not complain about any health problems related to the nature of their work. There is no special safety gear, but the workers claim that it is not needed.

No, only the machines have protection for fingers. (...) We have additional light by the machines. If someone says that it's too dark, she gets an extra lamp."

There is a first aid kit" and *"the doctor comes when he is needed"*

Accidents occur in all three factories and they are reported by workers.

◆ *Discrimination*

In answer to a general question concerning discrimination on the grounds of sex, origin, trade union affiliation, religion, single parenthood or other criteria most (but not all) respondents claimed that there are no instances of such discrimination in the surveyed sites.

The answers to more detailed questions were more diverse. In Factory 1 most controversies concerned issues of equal opportunities in getting a promotion (it was said that most higher and better paid positions are occupied by men and that women are often disregarded when an opportunity for promotion appears). Some employees also had doubts whether the principle of pay parity is observed. These doubts are intensified by the fact that employees must sign a confidentiality agreement that binds them not to disclose their hourly pay rate.

There were no reported cases of discrimination during recruitment. There even were some positive opinions:

"No, when I finished school and my son was born I couldn't find wok anywhere, they were always asking if I was married, about the child, but here it was not a problem, I just had to sign a paper saying that I agree to working on the night shift, because the baby was 4 at the time."

(seamstress from Factory 1)

In the two other factories there were no reported cases of discrimination. In Factory 3 the workers say that it's hard to talk about gender discrimination, since most of the employees are women who also hold manager positions:

"Younger and older women are employed. (...) There is one male seamster and he gets the same pay as we."

There were no reported cases of sexual harassment in any of the facilities.

In such a feminised industry, employment conditions concerning motherhood are very important: work during pregnancy maternity and child care leave, and returning to work after long absence from work. Previous research conducted by KARAT showed serious malpractice in these areas. Usually the problems involved denying employment rights, discrimination, dismissal or changing a contract agreement to a commission contract following childbirth. The present study shows that these conditions are better in the surveyed factories.

"If a women is pregnant, it's different here than in other factories, here they don't ask you if you're pregnant. The girls stay in the factory. Now we have a woman who came to work two years after she had a baby."

(seamstress from Factory 1)

Interviews with workers from Factories 1 and 3 show that pregnant female workers are transferred to lighter tasks or go on medical leave. After childbirth they go on maternity leave and later return to their jobs with the same employment conditions as they had before. They also usually obtain child care leave easily, though they often decide not to exercise that right because of lost pay.

"There is a young married couple in our factory, the woman became pregnant, and the work involves carrying heavy things and you have to work fast, and you have to be careful about such things during pregnancy. So she went on medical leave and then on maternal leave. The women come back without any problems, it's not like there is nothing to go back to."

Women employed in Factory 2 also claim that they can benefit from the pregnancy and maternal privileges, though they don't present any specific cases in their facility.

◆ *Employment legality and security*

Our survey of the three factories reported no cases of working without an employment contract. All interviewed workers signed a contract before they started working. Most workers with longer work experience usually have permanent employment contracts. Even if they are specified period contracts, they tend to be long-term, usually 3-4 year contracts.

All interviewed workers confirmed that they receive their pay on time, and that their social security and tax premiums are covered.

Employment security also involves such factors as relations with superiors, good atmosphere at work, a sense of identity with the company and staff rotation. There were some very clear differences between the factories concerning these issues.

In state-owned Factory 1 employees define their relations with superiors as good or at least neutral. They report that superiors are available and that they can talk to them about problems that concern work.

Workers confirm that they receive sufficient and comprehensible information concerning the company's present situation, strategy and development plan. It is usually given during meetings between the CEO and worker representatives from individual departments, who pass it on to employees, especially at times of repeated efforts to privatize the factory. Not all workers are interested in such information. This is a typical state-owned company, relations are polarised on an "us" and "them" axis. We - the workers, and him - the same CEO for many years. There is virtually no sense of attachment to the company.

The interviews showed that more and more workers leave the factory, which can be attributed to the improving job market situation. Employment conditions in this factory are stagnant, and workers find better offers elsewhere. *"Someone upstairs is having a shut-eye"* says one of the workers. Women and older workers stay, however, because it is more difficult for them to find better employment. They are content to be state-employed, mainly because of the social benefits and observation of the Labour Code. Unfortunately, they are constantly concerned about privatisation, which they view as synonymous to dismissal.

Factory 3 is at the opposite extreme. It is an example of a private firm with a team that has been working together for many years, with a strong sense of identity with the company that produces sportswear mainly under its own brand name:

"We have our own trademark and our own shops."

All workers have good relations both with the factory owner and their superior. The owner is in direct contact with the workers and he often visits the factory floor. The women can freely turn to him for help as well as talk to the forewoman.

Some employees say that they are being briefed on the present situation, strategy and development plan of the firm, that this information is presented in sufficient scope and comprehensible manner, and that these matters concern them. The forewoman updates them after meetings with management. Other workers show no interest in these issues.

Most of the women feel good about working there and plan to stay with the company. One of them says:

"So far everything goes well here. Usually when I started working somewhere, that place bankrupted, I am glad that this one still exists (...). The bosses talk to the forewoman and she talks to us.

There are always new designs, the company is developing well since 15 years, I think. I'm finally hoping to work until retirement."

The situation in Factory 2 is much worse. There is no state employer to guarantee social benefits and no "family atmosphere" of the developing private firm. The attitude of the workers towards their CEO and their direct superior (the CEO's wife) is *reserved.* They don't complain about the relations, they can turn to them with work-related problems, but they are not fully satisfied with the relationship between management expectations and their wages.

The workers are provided with minimum proper working conditions and minimum pay. With the exception of the production manager, the women are not informed about the company's strategy or development plan. They are treated like a tool to handle incoming production orders. There is no reason for them to stay there, and staff rotation is very high. Workers say:

"Generally it's easy to hire new workers, but when the women come and find out what the wages are, they leave. They work for a bit and they leave."

Production for foreign clients

This year's survey was focused on cases involving sportswear production for the best-known sportswear brands and the effect of terminating such contracts on the workers. That is why along questions concerning labour rights, we prepared items about co-operation with foreign clients.

All of the surveyed factories produce clothes commissioned by foreign clients. In the case of Factory 2 it constitutes their entire production, Factory 1 partially supplies foreign companies, and Factory 3 treats orders from recognised foreign catalogue companies as additional profit to sewing its own brand clothes. Adidas and Puma are past clients of Factory 1, Factory 2 manufactured clothes for Kappa. In each factory workers remember these commissions differently.

Orders from foreign clients are remembered best in Factory 2. Some employees even talk about Kappa with nostalgia. They claim that at the time (ca. 1,5 years ago) they were in a much better position. The factory had more orders, the wages were higher, there was more work and they could earn more doing contract work:

"Oh, it was much better then, because they paid more. These designs that we sewed were more profitable. These were demanding orders, and since we also get paid for the amount of details in the design per piece of clothing, it was really good."

In Factory 1 where clothes were manufactured for Adidas and Puma, the foreign clients were not remembered with such sympathy, though the workers admit that the work was paid better, even if it was harder.

"We had commissions, but only for a short time. I know that we worked for Puma, because there was the stress - it was a good client and it has to be done well. (...) We also supplied Adidas, now we make clothes for sport firms, but not for the big ones."

Conclusions

Compared with results obtained in previous years, this year's survey showed a slight improvement in the general employment conditions of workers in sportswear factories. Obviously no unequivocal conclusions can be drawn, since the survey included only 3 factories from a narrow industry branch that produces sportswear and fabric. Certain facts, however, allow us to speculate that the changes taking place in these three facilities have a universal reach.

Improvement in labour conditions as far as employment legality and OHS standards can be observed. The wages and development opportunities for firms have not improved. It can only mean that Poland, especially since joining the EU, has stronger legislature and better implementation of regulations as far as the technical aspect of the production process and their financial control are concerned. There is still much to be done in the area of overtime pay, salary or due representation of workers, e.g. through trade unions.

The main problem of the workers employed in Polish clothing factories is an uncertain future, the sense of temporality, apathy and lack of will to engage in activities leading to the improvement of one's working conditions. Why struggle to change one's work environment if the job can be taken away at any moment? Sometimes it is better to wait for retirement or change the job.

The story of a seamstress from Łódź

I'm a seamstress, it just turned out that way

I'm 24 years old, I come from a place near Łódź. My becoming a seamstress just kind of happened by itself, I finished a school that prepares for that profession. I've been working in the industry for several years now - at first I was a seamstress, for half a year, in Łódź, fresh out of school, and I didn't really know all my options. I started working in this lousy plant, it didn't even have a bathroom, and it stank. The stench in the dressing room was so bad that I had to take a bath every time I went home. Sometimes I didn't receive my salary, one remembers dishonest employers long after they are gone. I got the money later, only after I went to court. In the centre of Łódź there still are many such small workshops with terrible working conditions, but sometimes people just don't care. They just wanted to get their 500PLN at the end of the month, and they did.

Then I went to Denmark for a few months and I worked in my trade. My qualifications improved very much, now I have a better position. I plan out the work, I tell the seamstresses how to sew. I get the designs from the client and prepare the production. It's just that in this factory I have to do everything and it's more than I'm qualified to do.

I'm the "bad one"

The company for which I work now has good working conditions, the factory is well equipped. But it's not so well as far as other things, and the wages are very, very low. The seamstresses have a hard time, they earn little. And I am the only person who fought with management to have Saturdays off. I had to fight for a long time and I was alone, so now I'm "the bad one."

It's not easy to get a leave, either. Last year I managed to get away for 2 weeks, but I I had to go back earlier because there was some work that only I could do, since I'm the only person who can operate this particular machine. Other people are not too ambitious, they don't want to learn how to handle it, so I must do it.

I don't remember ever getting paid for overtime. I once wrote a petition, saying that I would like o get more leave in exchange for the overtime, and i went to the CEO, but he laughed at me. For some time I kept notes on how much I worked overtime, but after a while I got bored with it. I think the law should be changed so that if I am supposed to have a free Saturday, then it's really free, not just on paper.

Also, there is not enough staff. I asked for one seamstress to be assigned to me, because it's hard to get all the work done on schedule, and when I can't handle it, when I'm tired, I make mistakes. I didn't get anyone.

The seamstresses generally work on all Saturdays, but there are people who have to be closely supervised and who have to be told to get to work.

When I was signing my employment contract, the accountant gave me another paper to sign, something about mobbing, it said that I will not complain, I didn't even finish reading it because he gave it to me quickly, told me to sign and took it away immediately.

I'm thinking about changing the job...

There are not many clothes constructors around. Another factory wanted to hire me, but my family is here and I haven't decided yet. I don't have children. Right now I have so much work I don't even have time to go to the hairdresser.

I had to support myself since I was 18, because when I came to Łódź I had to study, work, rent an apartment, all those things. Somehow I manage.

In Łódź, there is a sewing workshop at every corner. The conditions differ, generally seamstresses earn from 600-1000 PLN per month, because the wages are very low. In our factory, the seamstresses work very much, but the wages differ. It's painstaking work , because the clothes are shipped abroad, and the designs are difficult. If soeone say she earns 2000 PLN, she is getting it off the books.

There is plenty of work, but few seamstresses

It's really hard. Many girls quit, and less women choose the profession, because it is hard. Your back aches after the whole day, and you must sew, sew and sew. But hardly anyone emigrates, people in this business are not very ambitious and not open to opportunities. They stay, they don't want to change anything

PURCHASED IN POLAND

Polish sportswear and athletic footwear market. Available products, prevailing brands. Where do they come from, who produces them? The preferences, behaviour and awareness of Polish consumers.

The Polish sportswear market is estimated at ca. 300 - 400 million zlotys[30] annually[31]. It is the largest of all Eastern European markets. It is still developing as sports are becoming more and more popular among Poles, their dressing style is more casual and active life-style is promoted. Ca. 8% of Poles point to active sports as their favourite activity, but it is estimated that this number is actually higher[32].

Sportswear companies have an increasingly larger pool of clients and they take advantage of it, but not all are equally proficient at it. The Polish market is divided into two sectors: the recognised brand names and "the rest". The first group is divided between 4 major brands: Adidas, Nike, Puma, and Reebok, in this order. For every 4 zlotys spent on sportswear and athletic footwear in Poland, 3 zlotys goes to these four companies, or actually three, since Adidas and Reebok have the same proprietor[33].

The latter sector consists of lesser known brands or imitations of recognised brands. The majority of these products is manufactured in Asia, but "the rest" also includes Polish producers. They are trying to catch up, some faster, most slower, with the recognised brands' sector. They usually operate on local markets.

How do consumers find their bearings on the sportswear market

Consumers who took part in the research conducted by the KARAT Coalition as part of the *Fair Play in sportswear industry* project in 2007 will help us to find an answer to this question. The research group consisted of 140 consumers who purchased sportswear and athletic footwear, including 67 women (47,9%) and 73 men (52,1%). The group was diversified as to such factors as age, education and income. The respondents were collage and secondary school students as well as people with employment status. The research was conducted in several cities across Poland. All interviewees have been purchasing sportswear or athletic footwear items and were identified by pollsters mainly in the vicinity of locations closely connected to the industry (stores, sports facilities, athletic schools).

The research did not include a broad range of consumers. The goal, however, was not to present a static picture of an average Polish shopper in general, but a focused model that includes the perspective of consumers in the analysis of the Polish sportswear market and the discussion of consumer awareness. That is why the questionnaire included many descriptive items that focused on consumer preference, motivation and beliefs.

Our analysis of frequency, points and value of purchases can be supported by studies conducted by other, credible research institutes. The results of KARAT are compared to the findings of "Our clothes" poll conducted by the Polish Centre of Public Opinion Research (Polish abr. CBOS) in 2005, which surveyed a broader and more numerous respondent group of clothing consumers in general[34].

Unfortunately, the research of the KARAT Coalition is the only source of data concerning consumer awareness, since no other studies in this field were conducted in Poland hitherto.

Consumer behaviour

◆ *What amounts are spent by consumers on purchasing clothes?*

CBOS respondents report that they spend a yearly average of 146 zlotys[35] on clothing. Almost half claims that they are satisfied with the prices of clothes, though that same number has problems with finding "affordable" items.

[30] Approximately 81-108 million euro.

[31] M. Malinowska- Olszowy, Economical analysis of sportswear market in Central – Eastern Europe with particular stress put on Poland, presentation at 3rd International Textile, Clothing and design Conference – Magic Word of Textiles, October 8th – 11th 2006, Dubrovnik, Croatia

[32] Branża sportowa – analiza rynku (Sportswear industry – market analysis), TradeBizz.pl, www.tradebizz.pl

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[34] Centre of Public Opinion Research (CBOS),"Our Clothes". Findings report, 2005.

[35] Approximately 40 euro.

KARAT interviewees is a smaller, narrower group of sportswear and athletic footwear consumers, so the results of this research differ substantially from the CBOS survey, also in the aspect of sums spent on clothing. The most common response was 300 zlotys[36] spent on sportswear and athletic footwear in the last 6 months. At the same time the majority of respondents buys sportswear and athletic footwear items 4 times a year, whereas women buy them much more often then men.

◆ *Where do we buy our clothes?*

According to CBOS, the most commonly mentioned points of purchase are stores, where different brands are sold (13% claims to shop there on regular bases, 30% - quite often). Markets are also popular purchase points (12% and 27% respectively), as are street vendors, who received similar results.

KARAT findings in this respect are similar. Consumers interviewed by KARAT's researchers also say that their main purchase points are stores selling different brands and markets, especially popular among female consumers. A large group of respondents actively involved in sports also reports to shop in brand retail outlets.

◆ *What influences consumer choices?*

According to CBOS, mainly convenience - 84% and price - 55%. Buyers of sportswear and athletic footwear interviewed by KARAT name quality as the decisive factor - 3/4 of respondents. This may be due to the specific character of sportswear which has to have special features depending on sport discipline.

The importance of other criteria is similar, especially price – 66.4%. CBOS research shows that men are more brand-oriented then women (11% men and 4% women). Brand names are important for 37.7% of women and 41.4% of men interviewed by KARAT.

Both studies show that possession of recognised brand clothing is important for the youngest respondents.

Sportswear brands

According to CBOS, well-known brands are purchased by every twelfth respondent, and every third would like to buy them. Brands are especially important in the case of sportswear. In Polish the word "adidasy" is synonymous with sports shoes, from the name of the well known brand. Research on brand rating conducted by PBS DGA in February of 2007 shows that 4 sportswear brands (Adidas, Nike, Puma and Reebok) are among 10 most often recognised clothing brands in Poland. Adidas came first with 35% of spontaneous responses to an item concerning most popular brands[37].

[36] Approximately 81 euro.

[37] A. Burska, Co w szafie piszczy, czyli markowa (nie)świadomość Polaków (What screeches in the wardrobe, or brand (un)awareness of Poles), www.pbsdga.pl

These four brands dominate the Polish sportswear market, which is confirmed by responses collected by KARAT when asking about brands that are purchased, preferred and even disliked by buyers.

◆ *Sportswear brands recognition*

When asked to identify sportswear brand names, respondents interviewed by KARAT spontaneously named a total of 90 companies. 2/3 of the names, however, were only mentioned once by a single person, which means that the group of best-known brands is quite limited. Adidas and Nike, and to a lesser degree also Puma and Reebok were present in almost every response.

Listed below are the names of most often named brands, the remaining appeared in only a few responses.

Table 1. Spontaneous recognition of sportswear brands.

BRAND	Number of responses (total number of responders: 140)
Adidas	118
Nike	115
Reebok	87
Puma	84
Fila	13
Converse	11
Umbro	9
Alpinus	9
Asics	8
Campus	8
Decathlon	8

Source: KARAT Coalition study, 2007

The 4 top brands clearly outdistance the rest. 40% of respondents spontaneously identified Adidas as the best known brand, Nike - 25,7%, Puma - 9,3%, Reebok - 8,6%. The remaining brands had decisively fewer responses. The only Polish brands that were named - Alpinus and Campus, had 0,7% of responses, but they are not typical sportswear brands, belonging rather to the tourism-oriented outdoor clothing industry.

◆ *Purchased sportswear brands.*

When asked about sportswear/footwear brands purchased during the last year, consumers identified a total of 52 brand names, whereas 8 respondents defined the purchased items as "no-name" products. Again, the best known 4 companies have the lead: Adidas (34.3%), Nike (34.3%), Puma (27.1%), and Reebok (24.3%). Next come Decathlon with 7.9%, Converse (5.7%), Alpinus (4.3%), Campus (4.3%), Asics (2.1%) and Fila (2.1%).

Why do consumers choose these brands? Mainly for quality (49% of responses).

Price and even discount value were important factors. In any case, the quality - price relation is a big purchase motivator. In all 21.4% of respondents indicated price as a key factor. Another criterion is the aesthetic appearance of sportswear and footwear. Though the attitude towards choosing a particular brand is, one can say, emotional (*I like it, I feel good in it)*, there were also rational reasons for selecting give brand-name products: durability, reliability, professional workmanship. 5,7% of respondents indicated fashion as a reason for preference of a given brand.

Some respondents gave no specific reasons for choosing a given brand, but gave other arguments such as availability, coincidence, habit or child's preference (not the consumers').

◆ *Favourite sportswear brands*

41% of surveyed women and 54,8% of men have named their favourite brand. The fact of having a favourite sportswear or footwear brand depends on age. A clear majority (79,6%) of 15-19 year old teenagers declare that they have a specific brand that they prefer to others. Most 25-30 year old respondents (62,5%) say the same. Ca. 3/4 of respondents older than 30 claim that they do not have any favourite sportswear or athletic footwear brand.

When listing favourite brands, consumers identified a total of 19 names and the top of the list looks just the same as in other categories and just as far ahead.

Table 2. Favourite sportswear brands.

FAVOURITE BRAND	% of consumers naming the brand
Nike	15,7
Adidas	10,7
Puma	8,6
Reebok	7,1
Alpinus	2,9
Asics	2,1
Diverse	1,4
Campus	0,7
Champion	0,7

Source: KARAT Coalition study, 2007

We also asked interviewees to give us reasons as to why they responded in a given manner. The reasons were similar to responses to items concerning well-known brands - quality, aesthetics and brand attachment, price being a lesser factor. In the case of a favourite brand, however, there appeared a new category: brand identification. Responses confirm it: *"it supports hip-hop culture"* or *"it's cool to wear it."*

◆ *Are there brands that consumers would never buy?*

Yes, such brands are mentioned by 19.4% of women and 42.5% of men. Respondents identified a total of 12 brands that they would never buy. The top positions on this list are again occupied by the most often recognised, best known brands. Adidas again takes the lead with 9.6%, then Fila – 8.6%, Reebok – 5.7%, Nike – 4.3% and Puma – 4.3%.

Justifying their choice of least favourite brands, consumers again name quality and aesthetics as the decisive factors. Cultural and social connotations are also important. For example the best known brands are often connoted with groups of poor social standing called "chavs", with whom the interviewed consumers don't wish to be identified. This example shows how important brand image is. The collected data also shows how important brand recognition is - some respondents said they would not buy unknown sportswear or athletic footwear brands.

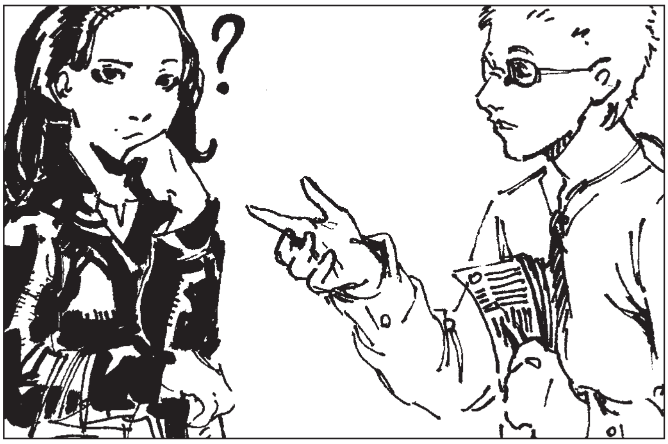
◆ *Polish sportswear brands, or the lack thereof...*

Consumers were also surveyed for their knowledge of Polish sportswear brands. As many as 67.9% (95) respondents were unable to name even one Polish company. The rest identified a total of 47 brand names, of which 33 are really Polish, but this number includes only 5 typical sportswear labels and 6 outdoor clothing brands. It is the outdoor clothing manufacturers that are best recognised. Consumers most often pointed to Alpinus and Campus. The remaining brands were named by fewer than 3 respondents. All answers to Polish brand items confirm that they are not well known among consumers. Especially companies selling typical sportswear items (T-shirts, tracksuits, athletic footwear) have failed to attract the attention of buyers, and it is a known fact that brands which were unable to gain consumer recognition have virtually no market position.

There were no answers, to any of the questions asked during the interviews, that would include Corporate Social Responsibility (CSR) strategies of sportswear companies. None of the companies were assessed, positively or negatively, from the point of view of labour standards or environmental issues. It is clear that Polish consumers take no notice of these operational aspects, whereas in many countries of the so called "old" European Union it was the pressure of consumer groups concerned with production processes that forced well-known brands to promote and develop CSR strategies. It is hard to find such attitudes in Poland.

Although not perfect either, in "old" EU countries the notion of responsible purchasing is much better developed than in Poland. When making conscious purchasing choices, growing number of consumers wants to make sure that the products have not been manufactured at the expense of exploited workers or devastated natural environment. The larger the consumer group, the better the response that can be expected from vendors and producers. Products certified as "ethical" are more often offered on the market and well-known manufacturers are pressed to consider such client expectations, even if at the beginning these are only image-building actions. Development of consumer awareness is a long-term process that has only begun. In Poland, "ethical" products, including clothes, are difficult to obtain, and consumer awareness is still regrettably low.

Our research confirms the above observations.

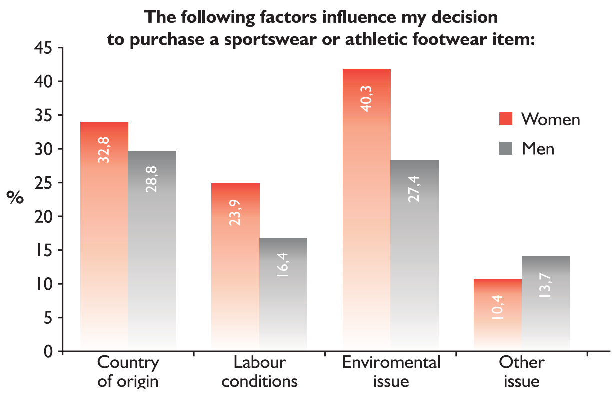


Consumer (un)awareness

The last section of the questionnaire used in consumer interviews was focused on the issue of responsible purchasing. We wanted to find out how much the average buyer knows about problems connected with the idea of consumer awareness.

At the beginning of this part of the interview we asked consumers whether such aspects as: country of origin, labour conditions in which the given product was manufactured, environmental, ethical or ideological issues were a factor in their decision to purchase a sportswear or athletic footwear article. Do they even take notice of such issues?

Results show that the country of origin is a factor for 30.7% of respondents, labour conditions - for 20%, environmental issues - for 33.6%, and other ethical or ideological issues - for 12.1%. Perhaps objectively it is not a high result, but taking into consideration the low level of consumer awareness in Poland, it seems to be a significant indicator.



Source: KARAT Coalition study, 2007

Women more often than men take under consideration the country of origin, labour conditions and environmental issues, whereas more men than women make consumer choices based on ethical or ideological issues (e.g. refusing to support a totalitarian regime in country of product origin).

As far as age criteria are concerned, research shows that the significance of country of origin increases with age. In the 35-45 age group half of respondents pointed it out as an important factor. Environmental, ideological or labour-connected issues have the least impact on the youngest respondents (15-19 year old).

We asked to support the response for this item. Why do the above factors influence the decision to purchase a sportswear or athletic footwear product? The motivations differed:

◆ *Country of origin*

The interest in country of origin is not always motivated by care for social or environmental issues. Many among respondents search for products manufactured outside Asia, believing that products made in the East are of poor quality. Some, however, try to avoid buying for example Chinese products to protest against companies who exploit their employees or, more generally, against a country where human rights are often violated.

◆ *Labour conditions*

Those who were influenced by labour conditions in purchasing sportswear or footwear often referred to examples of worker exploitation, mainly in China. Here are some statements concerning this issue: *"I don't want to exploit workers"*, *"my sister is a seamstress and I respect what she does, I am against violations of worker's rights."* Some respondents, even when they were not presently concerned with employment rights, claimed that *"if it was given on the label, it would matter."* Such arguments were presented by both men and women.

◆ *Environmental issues*

Issues connected to ecology proved to be the most decisive factor. Most interviewees stress the importance of environmental protection during the production process, recycling of materials or expressed reluctance to purchase clothes/shoes the production of which involved the killing of animals because of the material used, e.g. furs or leather.

◆ *Other factors, ethical, ideological etc.*

Least respondents base their purchase choices on other criteria than those discussed above. It is natural, since the question concerning ethical or ideological motivation was supplementary to previous ones. Some respondents, however, mentioned additional ethical or ideological factors that they take under consideration when deciding to purchase an item. Those factors include being a vegetarian, or protesting against oppressive regimes in countries where the article was manufactured.

◆ *Possible changes in consumer behaviour*

Many consumers do not base their purchasing choices on labour conditions, environmental issues or other factors concerning production of articles simply because they have no access to such information.

When asked whether information about worker exploitation in the process of production of a given article would influence their decision to purchase that item, as many as 69% of respondents said "yes". There was a slight gender diversification: 79% women and 60% men declared that they would change their decision to buy an item produced with violation worker's rights.

More varied results were obtained between age groups. The youngest consumers are least interested in the conditions in which their clothes are manufactured. Consumer awareness and sensitivity to respecting fundamental employment rights grows with age. Most positive responses - 80% were given by the oldest respondents: above 35.

Table 3. Impact of information concerning workers' right violations on purchase choices of respondents in different age groups [in percentages]

Source: KARAT Coalition study, 2007

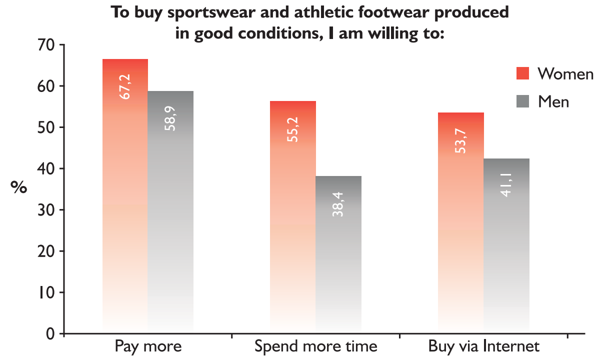
	15-19	19-25	25-30	30-35	35-45
YES	46.2	67.6	77.5	73.9	80
NO	53.8	32.3	22.5	26.1	20

Besides information on worker's rights violations or environmental issues during production, posted by different organisations (e.g. Clean Clothes Campaign), there are certificates, recommendations and labels on articles produced in desirable conditions. These include Fair Trade labels, certificates confirming that a given article was produced on an eco-friendly farm, recommendations given by organisations monitoring labour conditions, e.g. Fear Wear Foundations, and others. Unfortunately, such products are not yet widely available in Poland, but everything depends on consumer choices. We asked consumers whether they would prefer to buy articles certified as being produced in proper working conditions. The responses varied again in respect to gender. More women (98.5%!) than men (79.5%) purchase or would like to purchase "ethical", or at least partly "ethical" articles.

Differences between age groups are not as significant, though it can be noted that respondents most eager to purchase sportswear and athletic footwear items produced in fair working conditions come from the 25-30 age group (92.5%). Youngest consumers 15-19 gave the least number of positive responses (84.6%).

◆ *Consumers ready to pay the price*

An overwhelming majority of our respondents declared their readiness to purchase "ethical" products, but, at least at this time, such products are not widely available for sale in Poland. Therefore we wanted to know what price - literally and figuratively - consumers are ready to pay for such products. Would higher prices discourage them? How much more would they be willing to pay? Would they spend additional shopping time to find such products? Would they go to specialised shops or surf the Internet to find them? We met with rather positive responses:

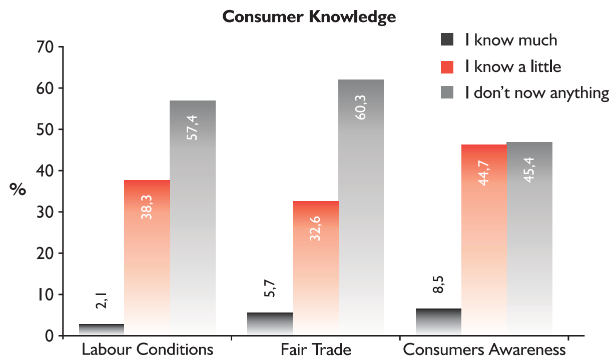


Source: KARAT Coalition study, 2007

Those consumers who declared that they would be willing to pay more for "ethical" products, would accept prices 10 – 20% higher.

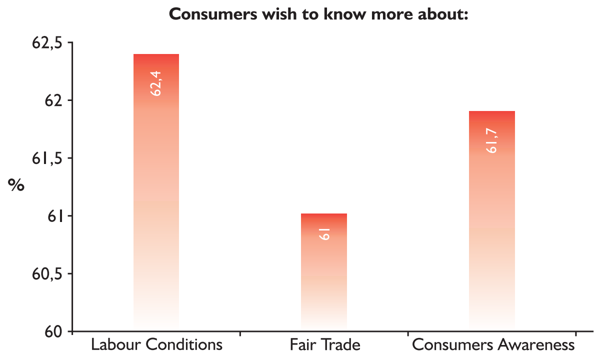
◆ *How much consumers know*

When interviewed, consumers were also asked to assess their own knowledge of labour conditions in which their chosen sportswear and athletic footwear articles are produced, fair trade and consumer awareness. Results show that the majority of respondents posses virtually no or very little knowledge on the above issues. Only a small percentage of consumers consider themselves adequately informed in these matters.



Source: KARAT Coalition study, 2007

It was comforting to hear that over half of respondents would like to learn more. A positive attitude towards the survey and their desire to receive additional information indicate that they were interested in the topic.



Source: KARAT Coalition study, 2007

Conclusion

Results of the study conducted by KARAT Coalition show, that even though the level of knowledge and awareness of Polish consumers concerning the problems of labour conditions during production and responsible purchasing is still low, their interest in those topics is growing. While assuming that a study involving a larger group of respondents would produce less optimistic results, it can be still presupposed, based on large predominance of positive responses found here, that this general tendency would be confirmed.

Poland is experiencing economic growth and Poles can now afford more consumption of goods. Poland is becoming a richer country, it is a member of the European Union, OECD, WTO, organisations that bring together the world's most highly developed economies. Perhaps the financial status should therefore no longer serve as an excuse for irresponsible purchasing.

Consumers have good intentions - they want to purchase articles produced in proper labour conditions and in accordance with norms regulating environmental issues, but they lack information. In order to make the right purchase decisions they need to know more about the production process and how their decisions can influence its improvement, what factors should be considered when buying goods, or where to find products certified or recommended by institutions and organisations that monitor the production process. The key issue, however, is the availability of such products on the market. Supply depends on demand so the chance of increasing availability lies in the purchase power of a large community of aware consumers.

Conclusion

The world clothing industry is a model example of what globalization means. The industry operates basing on a system of interrelations among big corporations and smaller factories cheaper countries, small independent manufacturers, workers etc. All manufacturers compete with each other, either for contracts and orders, or for customers at retail stores. These interrelations make the prospects for development for Polish manufacturers dependent on such factors as the free trade agreements between the EU and China, and working conditions of Polish seamstresses are contingent on the observance of labour standards in Asian factories. At the end of most of the relations chains consumers are placed. It is them who pay and should demand, also that the rights of workers who manufacture their clothes be respected. "Consumers power" seems to mean more today, when international corporations are beyond the control of national states and workers are poorly organized, sometimes they do not have the right to organize trade unions, and even if they succeed in doing so, there is little they can do on the level of a single factory, if the only contact they have with their 'actual' employer is when they put on a label with the employer's logo on another piece of clothing.

The worker will get only 0.4% of the price paid by the consumer for sports shoes in a shop, while the brand owner gets as much as 33%. As we can see, manufacturers put very high value on the brand, much higher than on the workers. What matters for the brand is its image, and the image is the consumers' opinion. Informed and responsible decisions they make while shopping, as well as the actions they take to demand that manufacturers observe labour standards, can have an impact on the situation of the exploited workers. Polish consumers should feel particularly responsible for Polish brands that more and more often shift their production to cheap Asian factories. It is important to be aware of this fact.

Global problems need global solutions. In the case of workers being exploited in clothing manufacturing worldwide, the greatest possible number of consumers from many countries needs to be involved in the issue. Their consumer choices must be supported by the actions of international organizations monitoring working conditions in clothes manufacturing and the manufacturers themselves. It is important that the Corporate Social Responsibility strategies developed by the manufacturers in response to consumers' interest in social and environmental issues related to the production process are not just a marketing pitch but a real contribution to the improvement of working conditions or respect for the natural environment.

In many countries, the consumer movement and employee supporting organizations that monitor production processes, lobby for their transparency and campaign for observing labour standards are more developed than in Poland. Here these issues and such actions are still a novelty, often treated with reserve. It will take plenty of time and educational programs as well as proactive campaigns to be able to talk about consumer awareness in Poland and consumers' contribution to the improvement of working condition in clothes manufacturing.

Even today, however, positive symptoms can be observed. An increasing number of organizations, volunteers and simply consumers who do care where the goods they buy come from are getting involved in actions for responsible consumption as well as working conditions improvement and respecting environmental standards in the production process. In Poland, this movement includes gender organizations such as KARAT, environmentalists such as the Polish Green Network (Polska Zielona Sieć), humanitarian organizations such as the Polish Humanitarian Action (Polska Akcja Humanitarna) and consumer organizations such as Grupa eFTe. Each of them sees the necessity to develop the idea of consumer awareness originating from different milieus and presenting different points of views: of workers, consumers or environmentalists. Consumers who make informed purchasing decisions can have a positive impact on all of these aspects.

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