

Development Prospects of Polish Protective Clothing Market after 1 May 2004. Threats and Opportunities

Abstract

This article attempts to analyse the emerging opportunities and threats connected with the new environment in which Polish enterprises started to operate after 1 May 2004. It also presents the conclusions that Polish protective clothing manufacturers can draw. In this context, we discuss the most recent trends in protective clothing manufacturing, as well as the newest management and marketing tendencies resulting from the need to adjust marketing operations to the evolving environment. The article is not limited to analysis of the supply-side of the Polish protective clothing market. A separate discussion is devoted to the effects of EU enlargement on the situation of protective clothing buyers, with emphasis on adjusting the Polish law to EU industrial safety regulations. In addition, the article discusses the economic aspects of implementing EU industrial safety requirements.

Key words: protective clothing market, globalisation, marketing strategies, single European market, EU enlargement.

Introduction

On 1 May 2004, Polish protective clothing market joined the EU single market, thus becoming fully subject to market regulations. This fact considerably changed the situation in the Polish market for protective clothing. The new circumstances affect both Polish producers of protective clothing and the buyers, in this case represented by employers.

The single European market, with its free movement of goods, puts product **safety** and **quality** at the top of the agenda. Many of the requirements laid down in international standards, directives and other laws must be met by the Polish economy in order to be able to join the market's mechanisms. Especially important are regulations governing standardisation, quality assurance systems, attestation and certification.

Consequences of Introducing the EU Standardisation and Certification System for Polish Producers of Protective Clothing

Protective clothing is one group within the category of so-called **personal protective equipment (PPE)**. The basic requirements that the personal protective equipment articles have to meet in order to protect the health and safety of their users, and the conditions for placing them on the single EU market, are laid down in **Directive 89/686/EEC** [9]. This directive specifies safety requirements for personal protective equipment and the relevant procedures allowing confirmation that such requirements have been met (the so-called conformity assessment

procedures). Personal protective equipment (including protective clothing) can be placed on the EU market provided that they have satisfied all the requirements of this directive.

The ultimate result of applying the conformity assessment procedures is the **CE marking** conferred on a product [36, pp. 54-56]. The CE marking has to be affixed to every and each article of personal protective equipment placed on the market. The marking indicates that a given product conforms not only with all the requirements stated in directive 89/686/EEC, but also with the requirements laid down in other directives, if applicable.

From 1 May 2004 onwards, this marking must be attached to each article of personal protective equipment traded on the Polish market, which includes protective clothing as well. On the same day, the B-safety marking, which informs about the human health safety, and which had previously been mandatory in Poland, became ineffective. This marking has become voluntary only.

Since the implementation of the EU certification and standardisation system in Poland, domestic producers have been provided with better access to the EU market (the dual certification system disappeared, which obliged Polish entrepreneurs exporting to the EU to apply for the CE marking and also certify their products for the B-marking at home). At the same time, however, suppliers in the member states are now able to introduce a broader range of products onto the Polish market without having to affix the B-marking to a type of protective clothing. Consequently, the choice of products

will improve in the near future, accompanied by the growing and considerable pressure of other European competitors.

This situation means that those producers which are most competitive and best prepared for these new challenges will remain on the market. They will have better access to markets in the member states while facing the stronger pressures from their EU competitors. Less efficient producers who are also unprepared for the reality of the new single European market will have to quit their business.

How Can Polish Protective Clothing Producers Compete on the Single European Market?

The question therefore arises as to which requirements Polish protective clothing producers will have to meet in order to be able to operate effectively on the single European market.

Norms and technical standards are only the first step

As we have already mentioned, the single European market puts safety and quality at the top of the agenda. Qualitative and technical specification of the product is extremely important, and in the case of protective clothing, it is obligatory. Clothing which protects humans from health hazards must meet basic safety requirements and comply with the standards in force. Its safety is guaranteed by the product's conformity with directive **89/686/EEC**, and by the CE marking that can be found on each article of protective clothing. It is hard to imagine that anyone might operate on the single

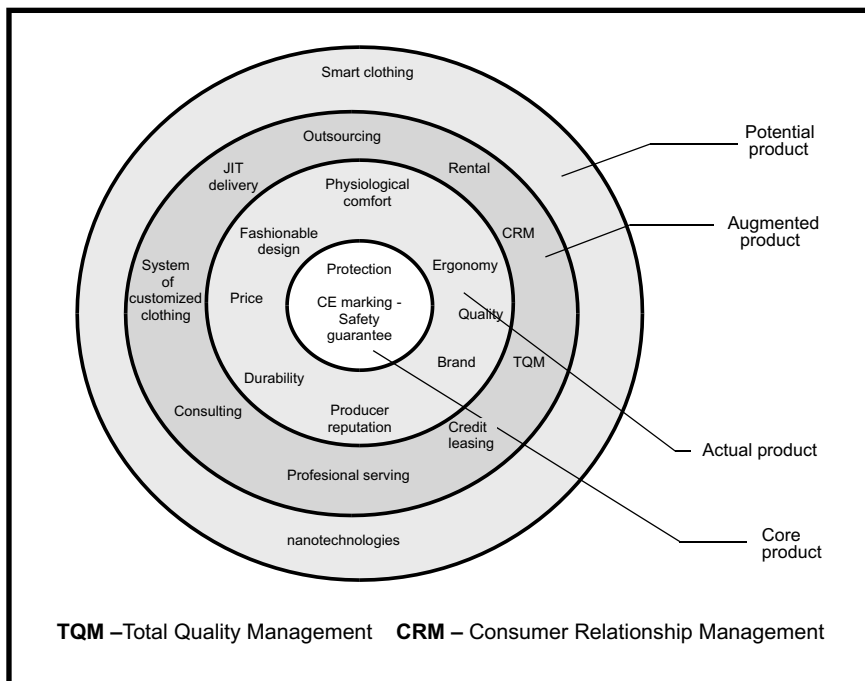


Figure 1. Product levels by the example of protective clothing. Source: developed by the author.

European market without certificates confirming that a quality assurance system is used on a regular basis. A theoretically voluntary ISO 9000 certificate is, in practice, a prerequisite to entering and remaining on the demanding European market. In short, compliance with standards and safety requirements is actually a precondition for operation on the single European market, but it is of itself by no means sufficient.

Modern protective clothing - an effective product management strategy

The field of protective clothing (PC) is diverse and involves many areas, each having its own requirements and special materials [7]. Much of the technology involved is among the most sophisticated available, and the end uses are complex and of great value. A protective clothing market is receptive to new products and suppliers, and abounding with niche markets, and for this reason it may be attractive to companies wishing to diversify. Many of the 'high-tech' fibres and products, such as Kevlar®, Nomex® (DuPont), and Twaron® (Teijin), Spectra® (Allied) HDPE fibres, PBI, Kermel® (Kermel), P84® (Inspec), carbon-impregnated fibres, aramid spunlace materials, fibre glass, even steel, copper, and other metal fibres have applications in the protective clothing area. Conventional materials such as nylon and polyester, cotton and wool are also used and provide satisfactory protection in certain applications, depending on the hazard or

exposure. When new fibres with unique properties are being developed, they are often considered for protective clothing. The PC market is representative of the *evolutionary* nature of technical textiles. As a market evolves and many of the most pressing problems are solved, effort is then expended on refining and solving problems more effectively. A common development thread is the creative and innovative application of available technology toward solving market needs. Much creativity and innovation go into PC [39].

Standard PN-EN 340 describes protective clothing as one that covers or replaces personal clothing, and provides protection against one or many risks, that is against situations wherein human health might be subject to deterioration or injury [34].

However, is it enough for a producer to offer this kind of clothing which perfectly performs its basic function as prescribed in the above standard, that is, adequately protecting the wearer from a hazard - in order to remain competitive on the single European market?

Today competition definitely takes place at higher levels of product than in the past (Figure 1). The product as an object of marketing represents a set of properties, or benefits (utilities), for the buyer. Modern companies do not offer a 'pure' product of itself, but actually a set of

utilities that comprises the quality of service, brand, the product's availability in a given place and at a given time, etc. The product itself is not invariable, but it is the object of a complex and varying structure. In the literature on the subject, we can find diverse concepts describing product structure that allows us to identify its layers (levels), like a cross-section of a tree trunk: the core product, the actual product, the augmented product and the potential product.

A slightly different approach to the layers, or levels, of a product uses a breakdown into a product's basic and additional functions as elements of its properties.

The **basic product functions** indicate the relationships between a product and the purpose it serves and which justifies its existence. For example, we can say that the basic function of heat-insulating clothing is protection from cold. These relationships determine product functionality. Products can perform their basic functions to different degrees. The relationships between a product and the degree of fulfilment of its purpose determine the efficiency that reflects how well a product performs its function. Therefore, these two properties of a product - **functionality and performance** - are together one element of its basic functions.

Another element of the product's properties is **additional product functions**, which show the relationships between the product and its user - a human being. Such additional product functions particularly include comfort of wear and attractiveness [15]. The comfort of wear can be expressed, for instance, through the product's ergonomics, how easy it is to put it on, low weight, freedom of the user's movements, ease of maintenance, or resistance to unskilful service. The aspect of **physiological comfort** is worth stressing here, because today protective clothing perfectly performs its basic functions, yet the directions of its world-wide development are for clothing to be made as comfortable as possible for its users [1]. This is very important, as clothing providing higher physiological comfort of wear contributes to the user's higher safety. This is due to the user's better mood, and thus possibly higher concentration, faster reaction to danger, etc.

Even though in the past protective clothing was not expected to be very attractive, nowadays this aspect is becoming

more and more important. Today modern protective clothing is expected to offer something more than protection. Beside this important basic function, clothing has to be comfortable, neat, inspire motivation and reinforce team spirit in the workers that wear it. It frequently becomes a crucial part of an enterprise's image and shapes its external perception.

Such clothing enables a company to present its personnel in a uniform way, but at the same time its users are guaranteed health and comfort of wear. Additionally, it helps develop a sense of unity, and the quality of materials proves that the company values its workforce.

A successful manufacturer of protective clothing must therefore adjust its range of products to individual customers' needs and jobs. A system of customised clothing has become essential, starting from the initial design, and proceeding through manufacturing and labelling; all of these stages must address the customer's expectations. The purpose is to make the design of clothing, its cut, colours, the application of accessories (e.g. reflective tapes, borders), type of fabric finish (waterproof, oilproof, or anti-electrostatic), as well as the prints and embroidered company logos, completely correspond to the image of the buyer's company. When products have identical basic functions, their additional functions may conclusively decide which of them will be purchased.

It is also worth stressing that industrial buyers pay special attention to the availability of additional product-related options such as service, installation, technical counselling, free delivery to the customer, or insurance of the delivery.

Forming product functions to satisfy consumers' needs also requires compliance with the principle of **economy of operation**. The basic criterion of this principle is that costs must ensure the profitability of the product's manufacture and use. Merely abiding by this principle cannot, of course result, in product modifications that would be undesired by the consumer. The process of product formation does not focus on making it cheaply without regard to its functions, but mainly on giving it the desired structure of functions and on moderate manufacturing costs. The formation of product functions is a process that involves many specialists, including engineers, constructors who concentrate on the product's functionality and performance, and designers

who are responsible for adjusting the product's usability to human needs. An important role in this process is played by the value analysts, who focus on the aforementioned principle of economy.

The process in which product and its function are formed should be co-ordinated, as the market and technological aspects of a product have to be merged. As a rule, the process is co-ordinated by marketing specialists. Hence the significance of **marketing as a link which joins the mutually dependent aspects of each product, both commercial and technological**.

One opportunity for Polish producers may be the cheaper prices of their protective clothing, resulting from labour costs still being lower than abroad, with quality and innovativeness being comparable. In recent years the processing and manufacturing costs have declined considerably, due to the close co-operation between suppliers of materials on one hand and clothing manufacturers on the other. It is nonetheless worrying that Polish producers today rely almost exclusively on western materials, especially regarding high-tech clothing types. For the competitiveness of Polish producers which results from lower labour costs to be fully exploited, it is necessary to have **better co-operation between domestic R&D institutes and the industry**.

The number of managers in the area of science and applied research is insufficient. In many cases this leads to extremely valuable outcomes of research being disregarded, with all the attendant consequences [40].

Adjusting marketing operations to evolving surroundings

The globalisation of modern economies is forcing enterprises to take new approaches to competition, and to modify their ways of operating in the new, more difficult and more demanding environment. Marketing managers must prepare themselves to deal with the consequences of the global economy and the realities of global competition [22,10].

Market changes have obliged enterprises to initiate relevant adjustments in their business management, which also includes marketing. Intensifying competition means that today we are dealing ever more often with so-called 'saturated markets' [32]. It is more and more difficult for enterprises to operate

and to attain their goals using the traditional, long standing methods whose effectiveness is now wearing thin. The evolving recognition of the importance of customer retention, market economies and the economy of customer relationships reinforces changes in mainstream marketing, among other trends.

This section of the article discusses the most recent management and marketing trends resulting from the need to adjust marketing operations to the changing environment.

Partnership marketing

The concept of **relationship marketing** is one of the most recent organisational solutions in the area of marketing policy. Today many firms depart from transactional marketing with its emphasis on selling. It is being replaced by relationship marketing, which stresses profitable, long-term relations with customers based on the firm's efforts to create the best value for the customers and to make them satisfied [see 29, p. 948, 6, 38, 11, 12, 14, 21-23]. Partnership marketing as an alternative approach to marketing based on the establishment and management of relationships has emerged in various contexts of marketing research and practice [17-19, 8, 3].

An analysis of the latest industrial marketing literature, as well as observations and examples of enterprises operating in the protective clothing market, permits us to assume that enterprises operating in the protective clothing market can successfully follow the principles of this concept; the market itself is especially receptive to the creation of long-term, partnership-based relations with buyers [5, 26, 27].

Outsourcing

Outsourcing is one of the most popular enterprise management strategies in the face of growing competitive pressures and progressing globalisation. It occurs when the execution of tasks, functions and processes which were hitherto fulfilled in-house is commissioned to an external provider specialising in a given area on the basis of long-term co-operation. Outsourcing helps an enterprise focus on its strategic tasks and goals - the core activity [13, 37, 42]. As a result of minimised expenditures on activities that are necessary but unrelated to the firm's basic functions and goals, the prime cost can be reduced [20, p. 373].

The broader use of outsourcing results from the build-up of competitive pressures [30]. The environment is becoming increasingly complex, technology advances ever faster, and the consequent changes in the operational environment of enterprises necessitate the search for new methods in order to keep ahead of one's competitors. In the past, the key to success was bulk; today the importance of high quality is growing. This situation requires precise identification of the line of business one wishes to follow (ensuring a competitive advantage), and a careful analysis of its weak and strong points [4].

Outsourcing can be found more and more frequently in the Polish protective clothing market also. This is shown by the number of firms that offer this type of service in the protective equipment market [2]. It is incontrovertible that in the area of protection equipment outsourcing should open new avenues; also, if added to the range of services offered by a firm operating in the protective clothing market, it may become a successful competitive tool and a way to strengthen the firm's market position.

E-business strategies

Topics connected with the Internet, e-commerce and benefits resulting from trading in the Net have been broadly discussed for several years. Terms such as e-business and e-commerce are becoming more and more important, as they increasingly frequently decide firms' competitiveness. Whether or not a company is successful today is largely decided by the speed and efficiency of its operations. A company of the future should not confine itself to traditional marketing methods; its strategy has to take selling systems and the methods offered by new technologies into account.

Effects of Poland's Membership on Buyers of Protective Clothing

The aforementioned intensification of competitive pressures is also changing the situation of the buyers of protective clothing. Theoretically, it is they who can benefit the most from the introduction of single market rules to Poland.

They will enjoy a better choice of products at lower prices. It should be remembered, however, that in the case of protective clothing the buyers are employers and the final users are workers. European law is very effective in making employers

comply with their obligation to provide workers with personal protection articles which meet the relevant safety and health regulations. Employers may be willing to perceive the changes as bringing higher costs of securing adequate protection for their employees in the workplace. It seems, however, that when such costs are set against the costs of possible accidents caused by deficient protection of workers, and that human life and health cannot be overvalued, then the balance always seems to be positive.

Enlargement of the EU and safety at work

Since 1 May 2004, the Polish market has been subject to the more exhaustive conformity assessment procedures operated in the EU. In other words, products that were exempted from any requirements or certifying procedures before that date, even though their use could have put a person at risk, will now have to go through pertinent conformity assessment procedures. The first positive effect of the changes is the prospect for safer and higher-quality protective clothing, which translates into improved safety and comfort of working.

Furthermore, the adjustment of Polish general industrial safety regulations to the EU's legal framework and the related gradual modification of Polish enterprises' approach to worker safety and health protection issues are important for the protective clothing market in Poland. The new attitudes are strongly influenced by economic factors [25].

Economic aspects of applying EU requirements to industrial safety issues

The costs of poor working conditions are still high. They can be estimated on the basis of disability benefits paid due to accidents in the workplace and occupational diseases. In 2000, such costs amounted in Poland to c. 4.2 bn zloty, equivalent to 0.5% of the GDP.

According to data made available by the International Labour Organisation (ILO) and other organisations, the indirect costs of accidents at work and occupational diseases unpaid by insurance and unregistered by insurance companies are three or four times higher than the direct costs. With that assumption in mind, the total costs of accidents at work and occupational diseases in Poland can be estimated at c. **1.5- 2.0% of GDP** [33]. This problem is not specific to our country. For instance, in Germany alone, estimate costs related to absenteeism

caused by occupational diseases and accidents at work exceed **€30 billion** a year (data from the Gemeinschaftsinitiative gesunder Arbeiten). This data should also be significant for the Polish protective clothing manufacturers which now have access to a huge market, and are receptive to innovative and price-competitive products that help reduce such costs.

The transposition of EU directives to Polish law and their implementation can be expected to reduce considerably the social and economic losses caused by improper working conditions. Of importance will be adjustments in regulations concerning accident and occupational disease insurance, particularly the introduction of variable insurance premiums related to the causes of occupational hazards and their results. Unquestionably, this will be an economic incentive for employers to improve working conditions. In practice, the higher the number of accidents and more hazardous working conditions in an enterprise, the higher the insurance premium which that enterprise will be charged [24].

Conclusions

The fact that on 1 May 2004 the Polish protective clothing market became part of the single European market has considerably changed the situation of both producers and buyers of protective clothing.

As for producers, new opportunities have emerged, connected with easier access to the vast EU market. At the same time, however, producers have to struggle with the pressure of their EU competitors. For producers to be able to effectively exploit the chances which have arisen not only to retain and enhance their position on the domestic market, but also to become visible and competitive on the single European market, European norms and standards have to be complied with in the first place. This precondition is necessary, but insufficient of itself. It is also necessary to work steadily on innovative products and their quality, and to constantly seek and use the available 'technological niches'. Productivity of labour must also be improved, so that prices can become more competitive. Competing against other EU players means being faster and more flexible. Therefore, capital outlays will be necessary to establish networks of outlets, to create attractive advertising and marketing, and to adjust marketing operations to the changeable environment (partnership

marketing, outsourcing, state-of-the-art technologies, e-business strategies). It is also necessary to co-operate better with domestic producers of fabric, and to utilise technologies more effectively.

Regarding the buyers of protective clothing, i.e. employers, they will have a better choice of cheaper products, as always happens when competition is strong. The extra money which will be spent on clothing due to the more restrictive industrial safety regulations in the EU should be viewed as an investment rather than as a cost. A well-protected worker wearing functional and neat clothing is a satisfied worker, with stronger motivation to work, and who is thus more productive and effective. In addition, modern protective clothing is a perfect means for advertising a company's brand or name. Also important are the reductions in the costs discussed above of absenteeism, and the savings represented by lower insurance premiums.

The enlargement of the European Union creates many opportunities for producers of protective clothing and its buyers, although new risks emerge as well. It is difficult to predict today what the net balance of the new opportunities will be; on one hand, and the difficulties produced by the new environment on the other. This will largely depend on the creativity of Polish enterprises, that is, on the degree to which they will be able to stand up to the challenges of competition dictated by the demanding single European market.

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