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PICKING UP THE THREADS? AN INVESTIGATION INTO  
THE CHANGING DYNAMICS OF THE CLOTHING INDUSTRY

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ABSTRACT.

Traditionally an important element within the West Yorkshire economy, the clothing industry is at present undergoing a radical restructuring process in quantitative and qualitative terms. The intention in this paper is to examine some of the major forces for change within the industry, the argument being that this sector may well be at the forefront of the new reordering of capitalist production along the lines of flexible specialisation. In terms of new technology, new working practises and changing inter-organisational relationships, the clothing industry can be seen to epitomise, in many respects, the new restructuring of the 1980s.

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INTRODUCTION.

The clothing industry has traditionally been an important one within the United Kingdom, and this remains true today. Despite this, the industry is generally assumed to comprise a series of fragmented sweatshops housing outdated and unprogressive technology and producing low quality, design deficient garments. As Alex Pirie, former Managing Director at Hepworths argues, the British clothing industry has been characterised by the fact that there

"Wasn't enough design input or enough innovation, and a lack of investment lowered technical expertise and the quality of the clothes produced".

(British Clothing Manufacture, June 1982)

Similarly, it has been alleged that

"There is a glaring communication gap between the design community and the manufacturing base. A dialogue of the deaf, one industry wag calls it. Misunderstanding, prejudice and downright ignorance of the production and design process continues to foster a 'them and us' climate between 'them that design' and 'them that make', which dulls the competitive edge".

(Financial Times, 26.2.87)

However, it is time to re-evaluate and reassess the industry, which has restructured its operations, invested in new technology at an unprecedented rate and has come to recognise the importance of design. No longer the archaic remnant of a former industrial age, the clothing industry has finally pulled up its socks! Indeed, to put it in national perspective:

"The clothing industry has a larger value added than the whole of the motor industry, more than half as much as aerospace and over three times the value added of the whole computer industry".

(Mr. MacArthur, Director of the British Textile Confederation, in British Clothing Manufacturer, June 1982).

Although the recession has taken its toll in employment terms, and the industry has been forced to face unrelenting foreign competition, falling profitability and an exacting monetarist government committed to the operation of a free market economy at all cost, there are other more positive indicators which suggest that the clothing industry has undergone a series of radical restructuring processes which comprise something of a revolution, and it is to an exploration of such survival strategies that this paper now addresses itself.

## 2. THE CLOTHING INDUSTRY IN NATIONAL PERSPECTIVE.

### 2.1 Introduction.

The clothing and footwear industry, as defined by Category 22 of the revised Standard Industrial Classification (SIC), can also be disaggregated into its constituent product sectors, which offers a more detailed insight into this heterogenous industry (See Table 1): For the most part, this analysis focuses upon Activity Headings 4532-4536.

Table 1

Sub-Divisions of the Clothing and Footwear Industry According to the 1980 Standard Industrial Classification.

CATEGORY	22 Footwear and Clothing Industry
ACTIVITY HEADING	4510 Footwear 4531 Weatherproof outerwear 4532 Men's & boy's tailored outerwear 4533 Women's and girl's tailored outerwear 4534 Work clothing and jeans 4535 Men's and boy's shirts & underwear 4536 Women's & girl's light outerwear & lingerie 4537 Hats & caps 4538 Gloves 4539 Dress industries

Source: HMSO Standard Industrial Classification 1980.

The recent history of the British clothing industry can be characterised by a period of relative growth and stability between 1975 and 1979, followed by severe recession in the post 1979 period, an era which took its toll on the industry particularly in employment terms; employment declined by 21% between 1978 and 1983, from 362,100 to 285,900.

Moreover, capital expenditure also fell dramatically from £345 million in 1979 to £208 million in 1983, and profit margins steadily declined from an average of 4.3% in 1980-81 to only 2.9% in 1982-83 (Inter Company Comparisons, 1984). The repercussions which such trends had upon the industry were an inevitable stream of liquidations, bankruptcies and redundancies. Indeed, redundancies in the clothing industry increased by 131% between 1979 and 1982 (Hollings Apparel Industry Review, Autumn 1987). The facts speak for themselves: this was clearly a disastrous era for the clothing industry. Indeed, it has been suggested that the years 1980-1983 were

"Three of the worst years that the UK industry has ever suffered".  
(Inter Company Comparisons, 1984)

It seems, however, that the deep recessionary trough has been surmounted in recent years, and that the industry is emerging from this difficult period with renewed optimism. Nevertheless, the transition has been a painful one, with radically transformed production processes which have increased capital's control over the labour process and have involved savage employment cuts alongside a variety of employment casualisation strategies which have dramatically altered traditional conceptualisations concerning the

nature of paid employment. Reference to a variety of indicators sheds light on the recent economic performance of the clothing industry.

## 2.2 Employment Performance

Reference to Table 2 reveals that employment within the industry began to rise in 1983 and, despite slight falls during 1986/87, employment in 1987 still stood above the 1981 figure, which is a particularly important revelation given the persistent trend of wholesale decline which is characteristic of British industry generally since the onset of the 1979 recession. That an industrial sector should reveal consistent employment growth for both males and females during the decade of the 1980s may be an indication that in certain respects the industry has successfully weathered the recession, and has emerged with renewed bouyancy and prosperity.

### Employment Trends Within The Clothing and Footwear Industry

YEAR	MALE	FEMALE	TOTAL
1978	100,600	297,500	398,100
1981	81,900	226,000	307,900
1983	75,200	210,700	285,900
1984	75,500	216,300	291,800
1985	77,900	223,200	301,100
1986	82,800	228,600	311,400
1987	83,700	226,500	310,200

Source: Department of Employment (Census of Employment).

## 2.3 Productivity Change within the Clothing Industry.

Not only has employment within the clothing and footwear industry enjoyed continued growth, but productivity has also shown steady increases, not only absolutely, but also relative to manufacturing as a whole: Table 3 reveals that while in 1979 output per head in the



clothing industry was 16 points behind 'all manufacturing', by 1982 the indices were equal at 110, with productivity in the clothing industry surpassing that of manufacturing generally in 1983, such that by 1985 productivity in the industry stood at 161, 34 points above that for 'All Manufacturing' industries. Such rapid increases in productivity are again indicators that the clothing industry is no longer struggling under the recessionary conditions associated with earlier years.

Table 3

Output per Head in the Clothing Industry, 1979-1985.

YEAR	ALL MANUFACTURING	CLOTHING
1979	104	88
1980	100	100
1981	104	101
1982	110	110
1983	118	125
1984	124	144
1985	127	161

Source: Business Monitor, NEDO.

Notes: 1980 =100.

#### 2.4 Capital Expenditure.

Fixed capital expenditure within the clothing and textiles industry has also risen sharply since 1981, increasing by £161 million (at 1980 prices) between 1981 and 1986, after a period of accelerating decline between 1979 and 1981 (See Table 4). This increased capital investment is particularly important since it runs counter to the trends for manufacturing as a whole, which experienced a decline in capital expenditure between 1979 and 1983. Thus, while capital expenditure by the clothing and textiles industry increased

by 6% between 1976 and 1986, expenditure by manufacturing generally revealed a decline of 2%.

Moreover, if the low point of 1981 is taken as the base rate, investment by the clothing industry increased by 98%, while that for 'All Manufacturing' increased by only 30%. Clearly, not only is the expenditure performance of the industry recording marked increases, but the industry is also surpassing figures for manufacturing in general, its performance being well above average.

Table 4.

Fixed Capital Expenditure, 1976-1986, (£ million, at 1980 prices).

YEAR	CLOTHING TEXTILES & LEATHER	ALL MANUFACTURING
1976	308	6,437
1977	295	6,757
1978	343	7,220
1979	345	7,496
1980	235	6,478
1981	165	4,865
1982	205	4,704
1983	208	4,779
1984	267	5,752
1985	291	6,424
1986	326	6,329

Source: British Business.

Notes: Figures refer to the clothing, textiles and leather industries since figures for the clothing industry alone are unavailable.

#### 2.5 Demand for Clothing.

In terms of consumer expenditure, the clothing industry again appears to be enjoying a buoyant state of trade, with real expenditure on clothing increasing both absolutely and also relative to total consumer expenditure. Thus, while expenditure stood at

£5,718 million in 1960, this figure had increased to £13,279 in 1986, which represents an increase of 24%.

Moreover, while the proportion of real consumer expenditure devoted to clothing stood at 6.5% in 1960, the figure had increased to 8.3% by 1986, such that clothing and footwear now account for more of a consumer's overall budget than ever before (See Table 5).

Table 5

Real Consumer Expenditure on Clothing and Footwear, £million, 1980 Prices

YEAR	TOTAL EXPENDITURE	CLOTHING & FOOTWEAR	% OF TOTAL
1960	876,610	5,718	6.5
1970	110,956	7,439	6.7
1980	137,234	9,873	7.2
1981	137,211	9,788	7.1
1982	138,277	10,145	7.3
1983	143,603	10,592	7.6
1984	146,667	11,561	7.9
1985	151,986	12,378	8.1
1986	159,715	13,279	8.3

Source: Economic Trends, Annual Supplement, July 1987.

## 2.6 Market Characteristics.

The economic health of the clothing industry is strongly dependent on the role of the retailers, who represent the industry's major customer, and it is clear that changes in retail sales must be important indicators of the well-being of the industry. Again, the signs are that the clothing industry has undergone somewhat of a revival in recent years, with retail sales consistently outperforming the 'All Retail' figure both in volume and value. Thus, the value of clothing and footwear retail sales has increased by 75 points between

1980 and 1987, and overtook the figure for 'All Retailers' in 1985, standing 9 points above the average in 1987 (See Table 6).

Similarly, the volume of clothing and footwear retail sales has also been increasing since 1980, both absolutely and also relative to retailing generally. Thus, from a low point of 97 in 1981, the index of retail sales increased to 141 in 1987, which is 12.7 points above the figure for 'All Retailers'.

Table 6

Index of Retail Sales, All Retailers Versus Clothing and Footwear Retailers, 1980-1987, 1980=100.

YEAR	VOLUME (SEASONALLY ADJUSTED)		VALUE (NOT SEASONALLY ADJUSTED)	
	ALL RETAILERS CLOTHING & FOOTWEAR		ALL RETAILERS CLOTHING & FOOTWEAR	
1980	100.0	100.0	100.0	100.0
1981	100.2	97.0	108.2	102.0
1982	102.2	100.0	117.1	109.0
1983	107.1	108.0	127.9	124.0
1984	110.7	114.0	138.2	138.0
1985	115.3	122.0	150.4	155.0
1986	122.6	137.0	162.9	170.0
1987	128.3	141.0	166.0	175.0

Source: Hollings Apparel Industry Review (1987), Autumn.

## 2.7 The Balance of Trade Within the Clothing Industry.

Despite such signs of economic revival, reference to trade figures for the clothing industry reveals a negative balance sheet, with the situation deteriorating in recent years (See Table 7). While exports have increased by 83% since 1978, imports have eroded this competitive position, having increased by 159% between 1978 and 1986. The result is that the trade balance has dramatically deteriorated since 1978,

the figure for 1986 being -£1,158 million (See Table 7).

Such import penetration must be a reflection of intensifying global competition which is causing grave problems for the British industry, who are desperately trying to fight off low-cost imports, particularly from the countries of the Mediterranean rim.

Table 7.

Trade Balance of the Clothing Industry, 1978-1986 (SITC 84)

YEAR	IMPORTS	EXPORTS	BALANCE
1978	920,746	670,004	-250,742
1979	1 194,446	751,088	-443,388
1980	1 231 122	807,558	-423,564
1981	N/A	N/A	N/A
1982	1 500,755	840,351	-660,404
1983	1 601,480	865,394	-689,454
1984	2 013,149	996,392	-1016,757
1985	2 094,680	1 171,923	-922,757
1986	2 386,678	1 228,286	-1158,392

Source: Hollings Apparel Industry Review, Autumn 1987.

Notes: Figures in £000.

SITC= Standard International Trade Classification.

## 2.8 Earnings and Wage Rates Within the Clothing Industry.

Reference to Table 8 reveals that average earnings for both males and females have consistently been below the manufacturing average, with male earnings increasing by only 51 pence between 1983 and 1986, while females' average earnings in the clothing industry increased by only 45 pence over the same period. The figures clearly reveal not only the fact that female earnings are consistently below those for men, but also the fact that such a gender gap is increasing.

Table 8

Wage Rates Within the Clothing Industry, 1983-1986.

YEAR	AVERAGE HOURLY EARNINGS (PENCE)	
	ALL MANUFACTURING	LEATHER, FOOTWEAR & CLOTHING
FULL TIME MALES		
1983	343.6	271.6
1984	367.7	286.5
1985	397.1	309.0
1986	426.8	323.0
FULL TIME FEMALES		
1983	237.2	198.6
1984	252.9	212.6
1985	271.0	229.6
1986	289.7	243.3

Source: Employment Gazette 1987.

Moreover, Table 9 reveals that the earnings for manual workers within the industry are far below the manufacturing average, with the figures again revealing marked, and increasing gender discrepancies: while the average manual manufacturing wage for males was £182.25 per week in 1986, the figure was only £134.81 for males in the clothing industry and only £89.53 for female manual workers. The latter figure does not even reach the threshold of a living wage (£115 per week, as laid down by the European Charter), and the clear implication is that many of the apparent gains within the clothing industry in recent years have perhaps been realised at the expense of earnings for employees within the industry.

Given that 73% of the workforce within the clothing industry are female, a question mark must surely hang over the conditions of work

within the industry, whose fairy tale story of economic turn-around offers an altogether less rosy picture for its unfortunate employees.

Table 9

Manual Earnings in the Clothing Industry 1983-86 (Weekly, in Pounds)

YEAR	ALL MANUFACTURING	LEATHER, FOOTWEAR & CLOTHING
FULL TIME MALES		
1983	146.19	113.94
1984	157.56	119.69
1985	170.58	129.72
1986	182.25	134.81
FULL TIME FEMALES		
1983	90.32	73.60
1984	96.30	78.58
1985	103.21	85.22
1986	110.45	89.55

Source: Employment Gazette, 1987.

## 2.9 Conclusions

Clearly, in many respects, the clothing industry has indeed undergone something of a revolution, with many of the indicators of economic prosperity, which have for so long been declining apace, finally showing signs of an upturn. It would appear that the deep recessionary trough of 1979-1982 has been surmounted since 1983. It is to a consideration of the contemporary characteristics of the clothing industry in West Yorkshire that this paper now turns.

### 3 THE CLOTHING INDUSTRY IN WEST YORKSHIRE.

#### 3.1 Introduction.

The clothing industry has traditionally been an important component of the economic base of West Yorkshire, being particularly concentrated within the Leeds area of the county. Indeed, the importance of the clothing industry within the Leeds conurbation can be exemplified by reference to the Census of Population. From this data Gillingwater (1986) reveals that Leeds was the 'second highest District in the UK in employment terms, accounting for 14.5% of total employment, and being second only to Inner London (32.9%)'. Clearly, since the industry is concentrated within West Yorkshire, and within Leeds in particular, then this represents a valuable spatial scale upon which to target investigation.

#### 3.2 Employment and Employment Change Within the Clothing Industry of West Yorkshire.

The industry employed 20,925 people in West Yorkshire in 1984, and is over-represented within the county, and with almost 3% of total county employment compared to the national average of 1.5%.

More importantly, perhaps, is the fact that the industry is highly female oriented: while 15,783 females work within the industry, which represents 75% of the total workforce, only 5,143 males were employed in the clothing and footwear industry in 1984 (25% of the total).



Also significant is the fact that the vast majority of this is full time employment: 96.6% of all male employees work on a full time basis and, similarly, 86.5% of all female employees within the industry are classified as full time workers. Clearly, this is an industry with a very characteristic employment structure.

Table 10

Employment Characteristics of the Clothing Industry in West Yorkshire

	1981 No.	1984 No.	% OF TOTAL	CHANGE No.	%
MALE FULL TIME	6,362	4,971	23.7	-1,391	-21.9
MALE PART TIME	413	172	0.8	-241	-58.4
MALE TOTAL	6,775	5,143	24.6	-1,632	-24.1
FEMALE FULL TIME	13,581	13,658	65.3	+77	+0.6
FEMALE PART TIME	2,974	2,125	10.2	-849	-28.6
FEMALE TOTAL	16,555	15,783	75.4	-772	-4.7
TOTAL	23,331	20,926	100	-2,405	-10.3

Source: Department of Employment (Census of Employment)

The clothing industry was also an important generator of employment change within the county between 1981 and 1984, the impacts of which have been differentially felt by various sub-sections of the labour force, with job loss being the dominant element in the employment change process: male full time and part time employment declined by 1,391 (-22%) and 241 (-58%) respectively, and female part time employment declined by 849 jobs (-29%). Yet standing in marked contrast to this is the female full time category which actually enjoyed employment growth during the period, witnessing an increase of 77 jobs which, while not compensating for job losses incurred by other sections of the workforce, is nevertheless an optimistic trend

within an industry which has been recently associated with wholesale decline, and suggests a strengthening of the position of full time female employment within the industry relative to male employment and, more particularly, to part time employment. These trends are particularly important since they are not typical of the industrial change occurring within the British economy more generally. Unfortunately, more recent figures are unavailable, but such trends may signal the beginnings of an employment up-swing within the clothing industry of West Yorkshire.

### 3.3 Differential Shift Analysis of the Clothing Industry.

While the above employment analysis provides a useful indicator of aggregate trends, it fails to highlight areas of growth or decline which are peculiar to the West Yorkshire economy: the investigation gives no indication as to whether this employment performance is the national norm or is in some way unique to West Yorkshire. In an attempt to overcome such limitations, a differential shift was undertaken which can be conceptualised as a means to

"analyse how employment in a particular sub-region of the economy has performed over a specified time period in comparison with the regional or national economy within which it is situated"  
(Palmer, 1986).

The differential shift can be defined as that employment change which is not explained by either national trends or by the regional structure. In effect, it refers to the difference between actual and expected employment change. Regarding interpretation of results, a negative differential component indicates that the observed employment change in a particular industry is below the level that one would

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Table 11

RANKING OF THE DIFFERENTIAL COMPONENT FOR MALE EMPLOYMENT IN WEST YORKSHIRE, 1981-1984.

RANK	MALE FULL TIME		MALE PART TIME	
	DESCRIPTION	DIFFERENTIAL	DESCRIPTION	DIFFERENTIAL
1	MECHANICAL ENG.	-6,447	WHOLESALE & DISTN	- 251
2	PUBLIC ADMIN.	-4,358	MEDICAL SERVICES	- 250
3	ELECTRICAL ENG.	-2,082	CLOTHING ETC.	- 91
4	INSURANCE	-1,682	ELECTRICAL ENG.	- 57
5	NON METALLIC PRODS	-1,264	TRANSPORT	- 40
6	CLOTHING ETC.	- 997	TELECOMMUNICATIONS	- 20
7	FOOD ETC.	- 733	AEROSPACE	- 17
8	METAL GOODS MANUF.	- 710	METAL MANUFACTURE	- 13
9	TEXTILES	- 695	CHEMICALS	- 10
10	AEROSPACE MANUF.	- 677	RETAIL DISTRIBUTION	- 10
11	OTHER SERVICES	- 606	NON-METALLIC PRODS	- 6
12	METAL MANUFACTURING	- 291	MAN MADE FIBRES	- 6
13	GAS, ELEC & WATER	- 260	SHIPBUILDING	- 3
14	OIL & GAS EXTRACTION	- 151	TEXTILES	- 2
15	NUCLEAR FUEL	- 129	OIL & GAS EXTRACTION	0
16	INSTRUMENT ENG.	0	NUCLEAR FUEL	0
17	MAN-MADE FIBRES	4	MOTOR MANUFACTURE	0
18	MINERAL EXTRACTION	24	COAL EXTRACTION	3
19	SHIPBUILDING	25	GAS, ELEC & WATER	3
20	REPAIRS	25	INSTRUMENT ENG.	5
21	MINERAL OIL PROCESSG	64	MINERAL EXTRACTION	8
22	AGRICULTURE	145	MINERAL OIL PROCESSG.	9
23	WHOLESALE & DISTN	370	OFFICE MACHINERY	10
24	OFFICE MACHINERY	395	PAPER, PRINTING ETC.	12
25	COAL EXTRACTION	655	OTHER MANUFACTURING	18
26	TELECOMMUNICATIONS	673	METAL GOODS MANUF.	19
27	RETAIL DISTRIBUTION	717	MECHANICAL ENG.	24
28	TIMBER & FURNITURE	873	REPAIRS	28
29	OTHER MANUFACTURING	1,108	FOOD ETC.	57
30	CHEMICALS	1,202	AGRICULTURE	62
31	PAPER, PRINTING ETC.	1,221	TIMBER & FURNITURE	69
32	MEDICAL SERVICES	1,515	PUBLIC ADMIN.	251
33	TRANSPORT	1,652	HOTELS & CATERING	304
34	HOTELS & CATERING	1,684	OTHER SERVICES	366
35	CONSTRUCTION	2,680	CONSTRUCTION	396
36	MOTOR MANUF.	3,832	INSURANCE	401

Source: Department of Employment (Census of Employment)

Table 12

RANKING OF THE DIFFERENTIAL COMPONENT FOR FEMALE EMPLOYMENT IN WEST YORKSHIRE, 1981-1984.

RANK	FEMALE FULL TIME		FEMALE PART TIME	
	DESCRIPTION	DIFFERENTIAL	DESCRIPTION	DIFFERENTIAL
1	PUBLIC ADMIN.	-2,236	FOOD ETC.	-1,523
2	TEXTILES	-1,255	PUBLIC ADMIN	- 796
3	INSTRUMENT ENG.	-1,238	MEDICAL SERVICES	- 773
4	FOOD ETC.	- 821	INSTRUMENT ENG.	- 369
5	MECHANICAL ENG.	- 729	TRANSPORT	- 248
6	RETAIL DISTRIBUTION	- 504	CLOTHING ETC.	- 160
7	NON METALLIC PRODS	- 201	MECHANICAL ENG.	- 141
8	AGRICULTURE	- 130	NON METALLIC PRODS.	- 101
9	REPAIRS	- 120	ELECTRICAL ENG.	- 40
10	AEROSPACE MANUF.	- 46	INSTRUMENT ENG.	- 32
11	OIL & GAS EXTRACTION	- 42	AEROSPACE MANUF.	- 25
12	ELECTRICAL ENG.	- 34	MINERAL EXTRACTION	- 10
13	PAPER, PRINTING ETC.	- 26	MOTOR MANUF.	- 1
14	MAN MADE FIBRES	- 18	NUCLEAR FUEL	0
15	NUCLEAR FUEL	0	OIL & GAS EXTRACTION	2
16	COAL EXTRACTION	2	METAL MANUFACTURE	2
17	MINERAL OIL PROCESSG.	13	MAN MADE FIBRES	2
18	TIMBER & FURNITURE	16	MINERAL OIL PROCESSG.	4
19	SHIPBUILDING	18	SHIPBUILDING	7
20	MINERAL EXTRACTION	19	PAPER, PRINTING ETC.	18
21	CHEMICALS	31	OFFICE MACHINERY	22
22	METAL GOODS MANUF.	55	COAL EXTRACTION	23
23	INSTRUMENT ENG.	59	METAL GOODS MANUF.	43
24	OTHER MANUF.	59	GAS, ELEC & WATER	81
25	OTHER SERVICES	77	TIMBER & FURNITURE	86
26	GAS, ELEC & WATER	96	AGRICULTURE	87
27	CLOTHING ETC.	103	REPAIRS	94
28	METAL MANUFACTURE	106	WHOLESALE & DISTN.	109
29	OFFICE MACHINERY	140	CONSTRUCTION	115
30	TELECOMMUNICATIONS	168	TELECOMMUNICATIONS	147
31	WHOLESALE & DISTN.	297	OTHER MANUFACTURING	190
32	CONSTRUCTION	347	CHEMICALS	203
33	TRANSPORT	404	TEXTILES	289
34	MOTOR MANUF.	442	RETAIL DISTN.S	564
35	HOTELS & CATERING	807	OTHER SERVICES	2,776
36	MEDICAL SERVICES	2,317	HOTELS & CATERING	3,750

Source: Department of Employment (Census of Employment)

expect, while a positive result suggests that employment has performed better than expected.

While the technique has been criticised on a variety of grounds (For a comprehensive evaluation see Palmer, 1986), it can nevertheless be a useful analytical tool, an indicator of potentially interesting areas of enquiry. Since it exposes anomalous and peculiar industrial performance, the technique can thus direct the research effort towards areas of the economy which require further investigation.

What is revealed by a differential shift analysis of West Yorkshire is that the components for male full time, male part time and female part time categories all reveal an employment performance that is markedly worse than expected. Indeed, when measured against all (SIC) Categories, the industry has the third highest negative differential for male part time employment (-91) and the sixth highest negative differential for both male full time(-997) and female part time employment (-160). Yet, again in stark contrast to this, the industry has a high positive differential for female full time employment (+106), suggesting that employment performance here is better than expected: not only is the female full time section dominant over all others in employment terms, and not only is it the only category to have witnessed employment growth, but such trends are reinforced by it being the only employment group to record better than expected employment performance.

### 3.4 Enterprise Analysis of the Clothing Industry in West Yorkshire.

The enterprise data base constructed for this research (See Appendix I) identifies 35 'prime mover' clothing enterprises in West Yorkshire which have at least one subsidiary in the county employing more than 100 people. Of these 35 enterprises, the average number of establishments per enterprise is 2, although many are in fact one location concerns.

The data base also reveals that the clothing industry exhibits high levels of indigenous control: of the 35 large enterprises identified, 17 (49%) are headquartered in Leeds, and a further 31% (11) are headquartered in West Yorkshire, with only 7 having their headquarters outside West Yorkshire (London [2], Scotland [2], York, Barnsley and Manchester). Clearly, then, organisational control remains within West Yorkshire, and access to employment opportunities for the majority of employees within the large enterprises of the industry remains in the hands of local decision makers. Such a strong concentration of local control must augur well for the future development of the region, since the crucial decisions regarding organisational restructuring and development are taking place indigenously, and the interests of the local labour force and the local economy more generally will be of importance to decision makers. This evidence of local autonomy renders the fear of the concentration of capital, research and development and organisational control within the south east erroneous at least for the clothing industry which is clearly not characterised by a branch plant structure in West Yorkshire.

#### 4. A CROSS CASE ANALYSIS OF THE CHANGING DYNAMICS OF THE CLOTHING INDUSTRY

##### 4.1 Introduction

The argument in this section of the paper is that a new phase of industrial restructuring is emerging within the contemporary UK space economy which represents a realignment of the economy in spatial, structural and organisational terms. Broadly speaking, this new era corresponds with the demise of Fordist methods of production and the emergence of a new industrial era which can be generically referred to as the Post-Fordist system.

The clothing industry is used as one example of the likely configuration of the new restructuring of the economy, in much the same way as the textile industry was used in the paper entitled "Textiles the New Sunrise Sector: Euphoria or Euphemism?", Crewe, L. and Leigh, C. (1988). The procedure adopted throughout is a cross-case analysis, with information from individual cases being dispersed throughout the investigation, which comprises a series of sections, each section being devoted to a separate and identifiable cross-case issue. In effect, then, the individual cases serve as the evidentiary base for the study, representing pertinent examples of the broader processes under discussion. The ultimate intention is to synthesise a collection of case study material, to move beyond individual cases to a more general interpretation of the processes at work, in order to identify certain general principles which can hopefully be re-applied in analyses of wider collections of corporate enterprises in the economy.

A new configuration is manifesting itself in the clothing industry in a variety of different ways, both structurally and spatially, the major characteristic features appear to be a movement towards flexible production, encompassing new technologies and new working practises, and including dramatic shifts in the nature of paid employment, moving particularly in the direction of various casualisation strategies on the part of employers.

The rationale underlying the selection of the clothing industry as an illustrative example of some of these newly emerging currents of change relates to certain distinctive features which characterise the production and labour process, and which suggest that this sector may well be at the forefront of the new reordering of capitalist production along the lines of flexible specialisation.

In very general terms, evidence from the clothing industry suggests the emergence of a new dynamic which underlies capitalist production, namely, a movement away from price competition, the profit motive and supply side considerations, towards demand-led, non-price competition according to the dictates of the market. Since the clothing industry is a final consumer goods sector, the impact of the market has always been crucial and the industry has, by definition, to be responsive to demand in order to survive. Indeed, this has perhaps never been more important than at present, given aggressive foreign competition and increasing retailer oligopoly.

The clothing industry can be seen to epitomise, in many respects, the new restructuring of the 1980s: the large number of goods produced and the continual changes in fashion mean that the industry has for a long time been characterised by a drive towards productive flexibility: short runs, fast response time and rapid adjustment to fluctuating demand have come to typify the production process. Similarly, the industry has always maintained labour market flexibility: the difficulty of automating parts of the production process has meant that the labour component has remained high and this, coupled with competition from low labour cost countries has resulted in a variety of distinctive features, such as homeworking and sub-contracting which, once typical of the clothing industry, are increasingly coming onto the corporate restructuring agenda across a wide range of sectors. In this respect, then, the clothing industry can be seen to be at the leading edge of the restructuring of the economy towards the direction of flexibility.

Finally, in terms of the application of new technology, the clothing industry again appears to epitomise the new form of restructuring, and may be at the forefront of the structures associated with this new era of productive specialisation. New technology is allowing improved quality and design, and is also offering the potential for greater integration between different parts of the production system, so that maximum flexibility is assured at all stages of production. In particular, new technology is resulting in a more management and marketing oriented approach in contrast to the former focus upon production costs, which may well offer the potential for the regeneration of the domestic industry.



#### 4.2 RETAILER OLIGOPOLY AND PRODUCER FRAGMENTATION.

The restructuring survival strategies adopted within the clothing industry have been intimately linked to developments within the retail sector. Indeed, it is perhaps true to say that it is virtually impossible to understand change in the clothing industry without explicitly bearing in mind the pervasive role of the retailer: the retail sector is the clothing industry's major customer and has been increasing its share of clothing sales in recent years, such that while large multiples and retail chains accounted for 27% of clothing sales in 1950, with the remainder going to department stores, mail order, independents and co-operatives, this figure rose to 48% in 1966 and to just under 50% in 1976 (NEDO).

The power of the retailer can be exemplified by the following table, which reveals that the top four clothing retailers accounted for almost 30% of a total market share of £12,000 million in 1986.

Table 13

The Market Share Of The Major Retailers 1986.

RETAILER	MARKET SHARE
Marks & Spencer	15.3%
Burton	8.8%
C&A	3.4%
Storehouse	2.3%
Next	1.3

Source: Adapted from Retail Rankings, 1986, and Verdict Market Research Report, 1986.

Indeed, Allen and Brown (1983), revealed that the ten largest clothing retailers in Britain accounted for some 40% of total sales, with Marks & Spencer being fundamental in this respect, accounting for over 15% of all clothing sales in the UK. Indeed, the Verdict market research agency estimated in 1987 that almost £1.00 in every £8.00 spent on clothing and footwear in Britain goes through Marks & Spencer tills (Daily Telegraph, 16.3.87). Moreover, this concentration looks set to rise, with Burton's intending to double its shares of the womenswear and menswear markets to 16% and 26% respectively (Financial Times 3.4.87). Indeed, in the year from 1986 to 1987 the company almost doubled in size and profits increased by 85% (Sunday Times, 27.9.87). The effect that such an oligopolistic situation has upon the clothing industry is marked indeed, and with 90% of SR Gent's output and 80% of IR Dewhirst's output (to name but two) going to Marks and Spencer, many manufacturing operations in effect lose their own identity, becoming 'pawns in the oligopolistic retailers' kingdom', and functioning according to the exacting standards dictated by the buyer (See Table 14).

Table 14

The Dependence of Clothing Companies Upon Marks and Spencer 1986.

COMPANY	PROFITABILITY	DEPENDENCY (PROPORTION OF TOTAL OUTPUT GOING TO MARKS AND SPENCER)
COATS VIYELLA	21.5m	11%
CORAH	0.2m	55%
COURTAULDS	226.0m	12%
DEWHIRST	6.6m	85%
S.R.GENT	2.5m	90%
TOOTAL	42.0m	10%

Source: De Zoete and Bevan, textile analysts, printed in Investors Chronicle, 11.12.87.

Fundamental changes have occurred in the relationships between the clothing manufacturer and the retail buyer, with developments by the retailers placing specific demands on the manufacturers, who are in effect locked into an unequal power relationship over which they ultimately have little control. Retailers used to be happy to allow garment manufacturers to produce hundreds of garments each season and then make their selection, but the situation has changed with the retailer today being far more demanding and wanting to get deeply involved in what it is going to sell. As Sir Terence Conran said:

"We are no longer prepared to just go out and choose what manufacturers in their infinite wisdom have decided to make".  
(Newsweek International, 27.77.87)

This is particularly true in the case of clothing manufacturing. 'Vertical' is now taking on a new meaning: no longer a production term, it has become a way of describing a new integration between suppliers and buyers. No longer is the production territory sacred to any one sector of the trade but, rather, the retailer has encroached upon the production function, and has come to assume high levels of

control, becoming actively involved at all levels of the production hierarchy. The strength of such linkage structures and the fact that retail activity is becoming yet more concentrated means that the latter is coming to control the manufacturing base to no small extent, exerting a strong influence over production. By sub-contracting work out to clothing producers the retailer can maintain the optimum levels of control, yet can retain the flexibility which comes from not having to manage a vast workforce. In effect, then, control is retained while risk is effectively exporting down to those in the lower echelons of the production hierarchy.

Such changes have a variety of implications for the clothing industry. In many respects, the retailer has been crucial in forcing the industry to improve its competitiveness, with the high degree of buyer concentration forcing the clothing industry into a competitive mould, which is becoming increasingly synonymous with high quality goods. In terms of assured markets and profitability, the retailer has certainly been a vital component in the renewed buoyancy of the industry, particularly so in the case of Marks and Spencer:

"In the dark ages of the 1970s, Marks and Spencer's commitment to Buy British was the industry's salvation. Today it is the industry's biggest single customer, buying one-fifth of all clothing output".  
(Financial Times, 19.11.87).

However, there is another element within this equation, the fact that the supplier is locked into a position of dependency over which he ultimately has little control. In times of fluctuating market demand; directional and style changes in consumer demand; or when the economic screws tighten, the manufacturer may find his vital life

support system removed, as the retailer seeks out alternative sources of supply in response to pressures to maintain market share and to find cheaper sources of supply. The manufacturer becomes powerless under such circumstances with retailer concentration creating a powerful barrier in the search for alternative markets. Such control is perhaps most effectively epitomised by Marks & Spencer: although they provide their customers with huge contracts, in return they insist on scrupulous standards and wafer thin profit margins. They also demand exclusivity on different designs, different fabrics and even differently coloured threads from competitors. The result is that Marks & Spencers are both feared and revered, although they always ultimately have the upper hand:

"It is munificent to favoured suppliers- rewarding them with generous contracts, and merciless with miscreants".  
(Financial Times 19.11.87)

This dependency is epitomised by Marks' buying policies: when placing an order it wants to know everything about the business it is dealing with, particularly its employment and labour costs. It then negotiates from a position of strength, practically determining the supplier's margin. With the current surge of cheap imports Marks and Spencer knows it has to be even more competitive in the high street than usual:

"As before, when times were bad, suppliers were expected to share the burden. So it looks as if already tight margins will be shaved again. As a great British landmark, M&S is here to stay. But the same cannot be said for its suppliers".  
(Investors Chronicle, 11.12.87)

Indeed, the impact of retrenchment is clearly felt by Marks and Spencer suppliers: S.R. Gent, who manufacture dresses and casual wear almost exclusively for Marks & Spencer was savaged two years ago when

the size of the retailing giant's orders plummeted, and it is only just recovering. Although most of Mark's 600 suppliers have continued to perform well, the crunch will surely come if the market stops expanding. Marks and Spencer's buying policy, it would appear, is moving in the direction of the larger groups and away from the smaller companies which have been almost completely dependent upon M&S for sales. It is these smaller businesses, such as S.R. Gent and Dewhirst which stand to be hurt most by any downturn in the chain's sales:

"Their high volume, low margin production means that there are few other customers in Britain who could provide replacement orders in profitable quantities. They have nowhere to run to".  
(Investors Chronicle, 11.12.87).

It would appear that the strong arm of the retailer is becoming ever-more powerful:

"Most retail chains are now looking for long-term relationships with a smaller number of suppliers."  
(GLC, 1986).

The trend towards productive sub-contracting on the part of the retailer is perhaps most dramatically epitomised by the Italian clothing company Benetton, whose strategies are frequently cited as an example of the likely future organisation of productive capacity and are

"Flaunted in Britain as a model for others to emulate"  
(Mitter, 1985).

The success of the Benetton strategy relates to the maximum combination of control and flexibility, and is intimately related to the application of new technology throughout all stages of the production process, an issue which is addressed in the following section. While marketing and the skilled parts of the production

process (designing, dyeing, cutting) are handled directly by Benetton, production is decentralised and is sub-contracted out to small firms of makers-up or to homeworkers throughout northern Italy. The rationale is obvious:

"Benetton thus holds down its overheads, avoids the thankless task of managing a vast workforce and benefits from the much lower costs of the small subcontractors"  
(Financial Times, 29.10.83)

Similar systems are at the heart of the success of the new breed of clothiers in Britain such as Next and Burton's, and, although in less dramatic form than the Benetton case at present, the indications are that the British clothing retail system may well evolve in much the same way as the Benetton case, with Next perhaps being the furthest along this developmental sequence at present.

#### 4.3 THE ROLE OF NEW TECHNOLOGY.

"The only companies who are surviving are those who are getting modern equipment and using modern methods at work"  
(Mr. Doug. Thomas, West Midlands Area Officer for the National Union of Tailors and Garment Workers, Birmingham Post, 21.7.87)

Intimately related to the growing importance of the retailer is the role of technology within the clothing industry, which is providing another precondition for the transformation of the industry. Retailers are now using new technology as a major competitive weapon, and this has had an important knock-on effect upon clothing producers. It is true to say that the rate of technical change within the clothing industry has traditionally been low: the production process is typified by its labour intensivity, and is not well suited to automation. Indeed, the introduction of the sewing machine in the nineteenth century had been the major technological advance until recently, and even today, the dominant form of the labour process, particularly at the assembly phase, continues to be the single person-single sewing machine configuration.

However, this situation has been radically transformed since the introduction of microelectronics in the late 1970s:

"Technology of production, and with it the fundamental characteristic of the industry, is now undergoing a period of fundamental change more rapid than any experienced since the introduction of the sewing machine. Cheap computing power enabled by the microprocessor is being applied to all stages of direct and indirect production".  
(GLC, 1984).



The production process within the clothing industry can be conceptually divided into four major stages: design; pattern making and cutting out; assembly and finishing. The microelectronics revolution is having a differential impact upon all of these.

In the sphere of design, computer graphics are enabling rapid and flexible design alternatives to be assessed. However, it is in the spheres of cutting, pattern making, marking out and cloth spreading that truly dramatic changes are being felt:

"Computer aided interactive graphics and numerically controlled machine tools have to some extent revolutionised the activities of grading, marking and cutting".  
(Rush and Soete, 1984).

Regarding dyeing and finishing, sophisticated systems are now becoming operational which monitor the various stages in the addition of dyes and chemicals to the fabrics, with these controls reducing the discrete number of steps required for such operations and permitting greater flexibility in producing fabrics of specific colours and textures. This is in fact transforming the nature of the dyeing process, allowing the maintenance of fabrics in an undyed state until a later stage, such that the advantages of late differentiation and rapid response can be gained.

In addition to this, microprocessors are impacting upon the sphere of control, both through controlled, pre-programmed sewing machines which can rapidly perform the task in hand, and also in the sphere of management control, for sales analysis and forecasting, output monitoring and work-flow management. Finally, new technology is

revolutionising the stock control and distribution elements of the production process. For example, Marks & Spencer now have a highly sophisticated point-of-sale information system which represents the final stage in converting what had been a rather production-oriented business into one led by customers. Figure 1 summarises the major technological changes which have impacted upon the industry in recent years.

The implications of such technological developments are far-reaching, and it has been suggested that such technology is in fact ushering in a new phase of capitalist production which has been termed 'flexible specialisation'. The adoption of such flexible forms of production are creating the potential for new forms of industrial organisation, particularly in terms of the relationship between retailers and producers, and between large and small producers. Such a system is perhaps most lucidly exemplified by the Benetton case, a configuration which many British clothiers are now beginning to emulate: technology has been fundamental in the emergence of the Benetton chain as Europe's largest clothing producer: with an international network of over 4 000 shops in 57 countries, technology has become an essential part of the company's integrated production and distribution system. The three key elements of Benetton's advanced technology are its computer-aided design in styling and pattern cutting, its sophisticated international information system and its automated warehouse. Mr. Luciano Benetton is convinced that technology has been the key to his success:

Figure 1

Major Technological Changes in the Clothing Industry

TECHNOLOGY	APPLICATION
Computers	Used for wholesaling, stock control and fabric sourcing. Also by management for sales analysis and projections, and work flow management.
CAD/CAM	Speeds up the processes of lay planning, marking and pattern modification.
Numerically Controlled Cutting Implements.	Linked to CAD, this allows higher cutting speed, accuracy and product quality. Allows more efficient utilisation of fabric.
Laser Cutting	Computer guided laser cutting cuts single ply fabric at very high speeds and with accuracy.
Pre-programmed Dedicated Sewing Machines, Pre-Programmed Convertible Units.	Ability to automatically sew components such as collars and cuffs. Operator programmable machines will greatly increase flexibility.

Sources: Adapted from Rush and Soete (1984)  
Hoffman and Rush (1985)  
Gibbs (1986)

"To go from 3 200 to 4 000 shops during 1986 means a great deal of tiring organisational and distribution work- technology is the lubricant which makes it feasible".  
(Mr. Luciano Benetton, Financial Times, 13.8.86).

The importance of computerisation to the Benetton case cannot be under-estimated: a large computer stores the computer aided design (CAD) and pattern design system (PDS). Computers are used to lay out patterns for cutting. At the draft board, staff hold 'digitiser' electronic pencils and tap in sweater co-ordinates onto an actual size matrix. This is then video-checked and channelled through to the cutting room, where three automatic, programmed machines cut more than 70 sweaters in eight minutes: the full capacity is 15 000 garments in eight hours. Similarly with dyeing: computers are programmed with 270 different colour codes. Finally comes the Benetton data transmission system, which provides daily updates on sales and inventory. The success of Benetton is clearly revealed by the fact that profits were up by 140% between 1984 and 1985. The impact of this upon the clothing producers within the system is clear enough:

"What we need is...more pieceworkers north of Venice"  
(Mr. Luciano Benetton, Financial Times 13.8.86)

The oligopolistic position of the retailer and the trends towards a market-led production system in which the retailer is becoming explicitly involved within production, is implying that the adoption of new technology by manufacturers may be the only means by which they can satisfy the exacting demands of the retailer and it may ultimately be crucial to their competitive survival. Thus, I.R. Dewhirst, one of Marks & Spencer's major suppliers, have recently invested in some of the most modern machinery in Europe. Similarly, of the 21 Gerber cutters in existence in the UK in 1984, 14 were in the cutting rooms

of Marks & Spencer suppliers (Hardill, 1987). Similarly, Coats Viyella, another major supplier to Marks and Spencer, have recently invested £1.5 million on a fully automated Wet Processing Complex and dyeworks. In order to improve the levelness and fastness of the dyed thread, the complete dyeworks are now being operated by a series of micro processors.

However, the high capital outlay of much machinery means that its adoption may be restricted to large producers, such that

"Successful firms may be...the larger ones operating internationally with relatively large capital investment".  
(Keynote Publications Ltd. 1982).

On the other hand, the trend towards a policy of 'tight control' over design and marketing, alongside devolved production, often to a peripheral sub-contract of workers, as typified by the 'Benettonisation', and, to a lesser extent the 'Marks and Spencerisation' of the clothing industry, may erode the power of the producer, undermining the status of the manufacturer who in effect, becomes confined to the periphery, fulfilling little more than a role as a sub-contracted 'maker-up'.

#### 4.4 Market Segmentation and Product Differentiation.

A variety of influences upon clothing production, including damaging foreign competition from low cost imports, shortening product life cycles, enabling technological developments and changing relationships with the retailer are transforming the industry from one concerned with raw materials and production costs, to one driven by the competitive demands of the market place. The undifferentiated market has disintegrated and market segmentation is emerging as an important strategy being pursued by capital, with a variety of different marketing strategies being actively developed in an attempt to woo the customer and improve the competitiveness of the industry. Gone is the routineised production of standardised goods, the mass production of high volume, low value added goods, and in its place is emerging a strategy of product differentiation, demand matching and the vertical and horizontal dissection of the clothing market in a myriad of ways.

##### 4.4.1 Productive Flexibility and the Fashion Element: Rapid Response; Late Differentiation.

There has been an evident change of culture amongst large clothing enterprises, from manufacturing and then selling, to selling and then making. As one large West Yorkshire company have recognised:

"For many years we told the customer what they could have and when they could have it. And we have had to learn the lesson now that we will give the customer what they want, how they want it, when they want it. It has been a fairly painful transition".  
(Company Interview, July 1988).

Whilst this reduces uncertainty within the industry, minimises inefficient stock piling and reduces the damaging impact of trade and fashion cycles, traditionally so detrimental to the industry, it necessarily demands flexibility. In this respect, the trend towards rapid response strategies is intimately bound up with new technological developments which offer the requisite flexibility and adaptability to handle fluctuating demand patterns and the unpredictability which faces the industry. Advances in information technology and improvements in distribution efficiency enable buyers to react to sudden changes in consumer taste or to erratic trading conditions. Moreover, investment in new technology in the sphere of distribution enables clothing manufacturers to be faster and more flexible in responding to market demand. This is clearly exemplified in the case of Marks and Spencer: if the store needs extra supplies of a particular jumper in a particular colour, it can be delivered within five weeks, whereas just 18 months ago, the same process would have taken 14 weeks.

Indeed, such a rapid response strategy, enabled through the utilisation of new technology, may offer the potential for the regeneration of the industry. With retailers now firmly locked into a multi-seasonal merchandising cycle which includes low stocking levels and a speedier throughflow of ideas, new technological applications may offer British manufacturers the flexibility they need to compete, and may undermine the rationale for production or sourcing overseas, reinstating the domestic manufacturer as paramount. Retailers are now demanding lower volume and a wider range of styles at shorter time intervals, and shrewd technological investments on the part of

clothing producers are giving the advantage back to domestic producers, with whose rapid response strategies overseas producers can simply not compete. Indeed, as Far Eastern producers improve the quality of their output, it appears that speed, flexibility and efficiency are becoming major British weapons in the fashion war.

The fashion element is becoming increasingly important within clothing production: the traditional two-season fashion calendar has been replaced by four or even five shorter seasons: predictable products are 'out', a varied host of ever-changing garments is 'in'. There is an urgency to anticipate the customer, constantly to update, innovate and refine clothing lines in order to keep the value-seeking customer coming back for more. The upshot of this is an emphasis on shorter runs, quicker responses and flexibility all round. A new breed of clear-eyed marketers led the way, first the Italian chain Benetton, and then Britain's Next, among others, who understood their customers and their aspirations. This marketing role for retailers has also filtered down the production hierarchy as clothing enterprises have understood that it is the customer who is sovereign. Courtaulds, a textiles and clothing company, soon came to realise that it was in the fashion as well as the production business, and has introduced a novel education programme for managers, focussing primarily on product awareness.



Tony Braines, factory manager of the Yorkshire knitwear subsidiary Meridian, was enthusiastic in his praise of the scheme:

"I came away with a number of ideas: to offer the customer a better service; far quicker reflexes and how to get market shares in areas where I hadn't any before"  
(Tony Braines, Financial Times, 11.10.86).]

Similarly, in an attempt to improve their response to consumer demand and to survive changes in the British market place, the British Knitting Industry is investing £180 million between 1987 and 1992. Their 'dynamic response' strategy will be worth approximately £120 million every year in reduced stocks, increased sales and lower mark-down losses. The main thrust of the programme is to accelerate the response time of the clothing industry to meet the recent trend for smaller and less predictable orders and the increased demands of the fashion market. Fibre currently takes about four months to reach the retailer as a finished garment, although the garment spends only one day being processed. The Knitting Economic Development Committee believe that dynamic response could reduce the supply cycle to two months. Crucially however, the gross inequalities inherent in the relationship between clothing producers and retailers may mean that any benefits from such a scheme will accrue to the retailers, while the substantial investment necessitated by such a strategy will inevitably be borne by those at the beginning of the supply chain. Again the producer appears to be on the losing side of the relationship.

#### 4.4.2 The Design Element: Quality Not Quantity.

The traditional view of British designers is that they are frightfully talented but rather bad at business. That, say critics, is the reason why stylish people preferred to buy their clothes from abroad. Mr. Norman Sussman, Chairman of the British Clothing Industry Association, is only too aware of the British designer dilemma:

"Design is an area of great weakness in the UK and the industry should be giving urgent consideration to the sponsorship of young designers"  
(Financial Times, 3.10.86)

Yet things have got to change, and the signs are that this crucial design input, for so long absent from British industry, is slowly emerging as a potent force for change. It can be argued that design represents the key to arresting the potentially anomalous and paradoxical situation whereby a mini-boom at the consumer level is co-existing with a depression on the manufacturing front. In order to succeed, clothing companies must capitalise upon high quality brand names, tempting the customer with innovative clothes. Indeed, this may be the only way to stave off foreign competition, which tends to be targetted at the lower quality, standardised mass market. Design input is now expected to come not only from the retailer but also increasingly from the manufacturer. As NEDO recognise:

"Fashion is constantly changing, and this requires more design, innovation, market research and faster responses right up the supply line".  
(Financial Times, 30.12.85).

It appears that the manufacturers are beginning to sit up and take notice of the importance of design to the long term survival of the industry, the aim being to create the quality and the 'chic' which has been, until now, reserved for the Italians and the French. This emphasis upon design is in part manifesting itself by a move up-market, towards the quality, higher value end of the market, a trend epitomised by Allied Textile Companies:

"We are not catering for the mass market: we deal with a man's suit at a minimum cost of £600. We have taken a very up-market niche as our own. In every area we aim for the top range. This is the only route to take because nowadays you can't compete with low cost production from overseas".  
(Chief Executive, Allied Textile Companies, May 1988).

The importance of design, fashion, quality and flexibility are clearly recognised by the Illingworth Morris Group:

"We are moving towards higher value added goods. We are looking towards more specialisation in higher value added retail products. The pressure is to move in the direction of greater flexibility, and we have to move with fashion".  
(Personnel and Training Manager, Illingworth Morris Group, June 1988).

#### 4.4.3 Market Segmentation.

Another important trend within the clothing industry, and particularly in the sphere of clothing retailing, has been the constant re-definition of taste and the segmentation of the market in a myriad of ways. The result is that the number of different styles of garment in the fashion wear sector is increasing, as is the number of styles being dis-continued each season.

This concept of 'lifestyle focus' or market segmentation has been adopted in an attempt to try to deal with growing competition in an increasingly concentrated clothing retail industry. The strategy comprises a constant re-positioning of the product up-market as the product life-cycle progresses and there is a constant refining and improving of the product in an attempt to occupy niches within the mature market. Indeed, this appears to be an accelerating trend, as the product life-cycle of each style becomes ever-shorter. Such artificial creation of demand is a crucial means of maintaining profitability, and the segmentation route is a relatively easy path to follow in the clothing industry, since garments are typically seen as expressing the personality of the wearer. Indeed, the carving up of the clothing market according to such criteria as age and socio-economic group has now become big business.

(1) Demographic Segmentation: many retailers are now developing shops catering for specific, and often quite narrow age ranges, a strategy which capitalises on the perceived variation in taste according to stage in the life-cycle.

Table 15

Demographic Segmentation of Clothing Chains, 1986.

MALES	9-14	15-30	20-40	25-45
	Next Boys & Girls M&S Older Boys	Top Man Chelsea Man	Burton Foster Brothers	Principles Next for Men Austin Reed Benetton
FEMALES	9-14	15-19	20-30	25-45
	Top Girl Benetton 0-12 Next Boys & Girls M&S Older Girls	Tammy Girl Chelsea Girl Top Notch	Dorothy Perkins Etam Expressions Benetton	Evans Principles Richards Paige Next

Source: Adapted from trade information, Retail Business 1986, author's research.

(2) Socio-Economic Segmentation: another segmentation strategy is to dissect the market according to status and perceived life-style. Thus, Austin Reed and Country Casuals are specifically targetted at the higher income groups. Dawson International are a clear example of an enterprise who clearly target their customers, attempting to tap the higher income brackets:

"Dawson International is a high margin specialist, the umbrella for a whole host of small businesses, each with its own identity and brand names".

(Investors Chronicle, 31.1.86)

Closely linked to this is the segmentation exercise based upon the desire to 'buy a name' as an expression of only of identity but also of status. Benetton, Jaeger, and Burberry are all examples of this strategy, as is the company Dawson International, who retail under the Pringle trademark:

"The company cashed in on the 'brand hunger' of the early 1980s" (Market Place, Summer 1986).

Finally, the Next empire are segmenting their retail outlets on the basis of socio-economic status, with the 'Next Too' stores being targetted at the higher income groups, while the 'Next To Nothing' concept is aimed at the middle income groups, and deals with the cheaper lines or those which have been discontinued.

Clearly, segmentation is offering the potential for the revival not only of retailing, but crucially of the clothing industry, which must supply such highly differentiated products: not only does segmentation avoid head-on competitive pressures, it also stretches the product life-cycle and allows the marketer to offer a unique and highly differentiated product.

#### 4.5 Labour force Transformations: The Casualisation and Deregulation of Employment.

In various ways, the restructuring process has been extended into the sphere of work organisation through the pursuit of flexibility and the de-rigidifying of work practises. A variety of quantitative and qualitative transformations are taking place within the textile industry which are combining to dramatically alter traditional conceptualisations regarding the nature of waged work. Crucially, such transformations are taking an explicitly gendered form, and are altering not only the quantity and quality of employment opportunities, but also the gender divisions which exist within the industry.

The labour market of the clothing industry represents the nexus within which a variety of forces come together to transform the nature of employment, and during the decade of the 1980s, such forces are propelling the labour market in the direction of flexibility and casualisation, where 'flexible' is defined as a part time, temporary or self-employed worker according to Hakim):

"(The flexible labour force) now constitutes a fairly sizeable one-third of the workforce, rather than an insignificant fringe on the edge of the labour market as so often thought".  
(Hakim, C. DoE Gazette, November 1987, pp. 549-567).

Hakim (1987) also reveals that two-thirds of all women in work are in the flexible labour force, compared with only one-quarter of men. Moreover, the flexible workforce expanded by 13% between 1983 and 1986, which represents almost one million jobs.

The impetus for such changes can be traced to a variety of factors:

(1) Intense international competition has forced the industry into a competitive, high quality mould and, unable to compete with low labour, low capital cost countries producing cheap garments, it has been forced to capitalise on the only assets which remain, namely flexibility, proximity to market and high quality. Thus, the predictable response has been to seek the requisite flexibility to cope with the rapidly changing demands of the market, flexibility which has been extended into the sphere of the labour market in various ways.

(2) The desire to reduce the labour cost component of the production process as a means of maintaining/achieving competitiveness in depressed product markets and of obtaining greater levels of control over production. This factor emerged as a response against the

hoarding of labour on the factory floor in order to cope with fluctuating demand, since the latter is a very expensive business.

(3) An exacting government committed to the operation of market forces at all costs and to the deregulation and liberalisation of all spheres of economic life.

(4) High levels of unemployment which simultaneously reduced recruiters' fears of potential labour shortage for most occupations, and to make less attractive conditions of employment feasible.

(5) Large scale and dramatic enforced job loss during the 1970s was often as expensive in cash terms as it was for employees. The problems associated with 'hire and fire' strategies have thus led to the desire for more subtle and less painful ways with which to adjust the labour force in accordance with demand side fluctuations.

The clothing industry is a particularly important example of this drive towards labour market flexibility since it has a long tradition of using alternative, informal working practises such as outworking, due to the fact that it is a highly labour intensive industry which has always sought ways to reduce the direct labour component within the production process. The employment structure of the clothing industry has thus always been ideally suited to a shift from the open to the hidden economy, since assembly, the most labour intensive part of production, can be executed reasonably effectively on a sub-contracting or outworking basis. Moreover, the problems associated with pursuing a 'hire'em and fire'em' strategy, alongside the enormous costs encountered through the hoarding of labour on the factory floor has meant that outside sourcing of labour, through homeworkers or commissioned workers, makes sound economic sense.



Homeworking is a particularly important component in the shift towards flexible working practises, and is particularly advantageous to employers who can avoid the costs of national insurance contributions and therefore have no obligation to treat homeworkers as employees with rights such as protection from unfair dismissal and redundancy pay. Homeworkers thus provide a valuable reserve army of labour which can be taken on or laid off as demand fluctuates. Homeworkers are particularly vulnerable because they are

"Tied to their homes for domestic reasons and have few alternative employment opportunities; they are subject to variations in the workload; have little contact with other employees and are not represented by a trade union".  
(Commission on Industrial Relations Clothing Wages Councils Report 77, April 1977).

Although the measurement of the range and incidence of homeworking is a notoriously difficult task, since figures are not contained within most available sources, both official (for example the Census of Employment) and commercial (for example, company reports and commercial directories of employees), evidence suggests that it is women who are dominant in employment terms (See Table 17). Indeed, it has been suggested by Dingra (1985) that

"In the clothing industry...it is quite possible that they (homeworkers) form a substantial majority of the workforce".  
(Dingra, S. 1985).

Table 16

Estimates of the Number of Homeworkers.

	WOMEN	MEN	ALL
HOMWORKING SURVEY 1981, ENGLAND & WALES			
Working At Home	177,860	73,190	251,050
In Manufacturing Homework	60,270	12,000	72,270
WORKPLACE INDUSTRIAL RELATIONS SURVEY			
1980, GREAT BRITAIN, ESTABLISHMENTS			
WITH >25 EMPLOYEES			
Manufacturing Homeworkers & Outworkers			52,000
Freelances in Manufacturing			91,000

Source: Adapted from Allen, S. and Wolkowitz, C. 1987

Recent evidence from research carried out in West Yorkshire in 1980 (Allen, S. and Wolkowitz, C.) suggests that not only is homeworking widespread within West Yorkshire, but that the phenomenon is most apparent within the clothing industry (See Table 17)

Table 17.

Firms Using Homeworkers in West Yorkshire, 1980.

RANKED BY INDUSTRY	NUMBER OF FIRMS USING HOMEWORKERS
Clothing and Footwear	21
Other Manufacturing Industries	13
Distributive Trades	11
Paper, Printing & Publishing	10
Textiles	8
Chemicals and Allied Industries	7
Food, Drink & Tobacco	2
Insurance, Banking & Finance	2
Professional & Scientific Services	2
Total	76

Source: Adapted from Allen & Wolkowitz, 1987.

Notes: 12 firms identified were based outside West Yorkshire.

While many enterprises are reluctant to disclose any information regarding their use of homeworkers and outworkers, those clothing companies in West Yorkshire who were prepared to co-operate reinforced the supposition that homeworking is an important component of this use of unorthodox labour forms in the drive for flexibility: the Robert Glew Wool Industry stress the advantages of homeworking from the employers perspective: the company has a pool of some 1,200 hand knitters who are not on the pay roll and are not under a formal contract of employment:

"It is cheaper and more sensible for employers. It avoids having to provide food and accommodation for them".  
(Personnel Manager, Robert Glew Wool Industries, May 1988).

In response to the question as to whether homeworkers are predominantly male or female, the manager replied:

"How many male hand knitters do you know? Let's say its 100% female".  
(Personnel Manager, Robert Glew Wool Industries, May 1988).

Similarly, homeworkers contribute £3.5 million to annual turnover in one large clothing and textile enterprise in Huddersfield, the reasons offered for employing casualised workers being: (a) flexibility, (b) cost, (c) reduced need for space. The homeworkers are 100% female and 95% ethnic, the rationale being

"It happens to suit the locality where we operate...They can make a lot of money, but that's up to them. It works very well, and we like it".  
(Enterprise Interview, 1988).

This shift from the official to the unregulated sector, where recruitments are not made through the main channel of the labour market and where payments are made in cash appears to be adversely affecting female employees within the industry, and the conditions of employment experienced by homeworkers are a particularly extreme

example of women's lesser rights as workers, and this pursuit of flexibility has, as a backdrop, long hours and poor pay:

"The advantages management gains by being able to alter, at will and at no cost, the amount of work, the time given to complete it and the types of product and piece rates attached to them, is experienced by homeworkers as insecurity and unpredictability"  
(Allen, S. and Wolkowitz, C. 1987)

It would appear, then, that formal employment loss within the clothing industry has been coincident with the growth of a 'homeworker' sector employing a low wage, non-unionised workforce, and while this is nothing new within the clothing industry, as an unorthodox mode of organising the labour process, it is coming to play an increasingly important role within the restructuring process. In terms of the fragmentation, exploitation and peripheralisation which goes with such flexibility restructuring, this is a alarming path to tread.

## 5. CONCLUSIONS

This investigation has revealed that in both national and local terms, there are strong indications that the clothing industry has indeed witnessed an economic revival. Optimism has been restored, the industry has been given a new lease of life.

As a recent report by Keynote Publications states:

"The UK clothing trade has been performing particularly well over the past couple of years, and although the size of the industry may be considerably reduced compared with five years ago, those companies which have remained in business are proving efficient, profitable and competitive".  
(Keynote Publications Ltd. 1986).

Reference to a variety of indicators suggests that the deep recessionary trough of the late 1970s has finally been surmounted: productivity has been steadily increasing since 1983, capital expenditure has increased since 1981 and the value of retail sales has been growing since 1980.

Moreover, the analysis has revealed that a combination of circumstances may provide the opportunity for the regeneration of the industry: there has finally been a recognition that design and quality are crucial elements upon which the industry must capitalise. This 'up-market' approach, may provide just the boost that the formerly flagging industry so desperately needs.

Furthermore, the drive for flexibility is reinforcing the domestic advantage, and proximity to the market appears to be emerging as an important locational consideration, which must surely be a source of

optimism for domestic clothing manufacturers, and contradicts the idea that decentralisation to the low cost periphery is an inevitable outcome of capitalist development.

Finally, the dominance of the retailer within this increasingly market-led system is in many ways helping to revive the clothing industry: retailers are forging close links with manufacturers, offering guaranteed contracts and large orders.

However, such a quantitative success story masks what has in fact been a prolonged and painful time of widespread reorganisation within the industry. Beneath this glossy facade of economic buoyancy lie the realities of a dramatic restructuring process which has been imposed upon the industry, forcing it to 'pull itself up by its boot straps' in a final attempt to compete or face defeat. While the process has been a resounding success in terms of profitability, investment and output, when measured according to other criteria, such as the quantity and quality of employment, the outcomes have been altogether less appealing, and one may ask who the beneficiaries are within this newly emerging system. The answer is clearly not small firms, who are being increasingly pushed out since they lack the necessary capital which large new technology investments necessarily demand. Similarly, large firms are clearly not well positioned to benefit from such restructuring since employment contraction could be greatest in large firms where the potential for technical innovation and the application of microelectronics is the greatest.

The emerging retailer oligopoly is implying that the producer is becoming locked into a cycle of dependency, either being tied to fulfill a sub-contracting function for large retailers, or alternatively perhaps serving no function at all: the choice appears to be to have all your eggs in one basket and accept all the associated risk, or to have no eggs at all. Essentially, manufacturers may be becoming peripheralised, functioning essentially as sub-contractors to powerful retail chains, with the latter relegating risk to the next tier down in the production hierarchy.

Finally, despite technical change, the clothing industry remains labour intensive, and there exist strong pressures to reduce labour costs, which may usher in a variety of employment casualisation strategies, such as homeworking. Once again, labour force appear to be on the receiving end of a variety of casualisation strategies which are combining to undermine the quantity and quality of employment, gradually eroding employees rights and implying an altogether more exploitative and restrictive working environment.

APPENDIX

CLOTHING ENTERPRISES IN WEST YORKSHIRE.

<u>ENTERPRISE</u>	<u>SUBSIDIARIES IN WEST YORKSHIRE</u>
M. APPLESON & SONS LTD.	M. APPLESON & SONS LTD.
BENJAMIN SIMON & SONS	BENJAMIN SIMON & SONS.
B. BERWIN LTD	B. BERWIN LTD
H.E. & F.J. BROWN	H.E. & F.J. BROWN
BY CLOTHES	BY CLOTHES YORKSAIL LTD. MITCHELL WALKER & CO. BY FASHIONS LTD. STAGSLAX LTD.
CENTAUR CLOTHES LTD	CENTAUR CLOTHES LTD
COATS VIYELLA	JOHN MURGATROYD LTD.
COSS AND MORRIS LTD.	COSS AND MORRIS LYNTON CLOTHES LTD. NEWTONS (LEEDS) LTD.
COURTAULDS PLC.	COURTAULDS DISTRIBUTORS.
CROMPTON MANUFACTURING CO.	CROMPTON MANUFACTURING CO LTD. DENBY DALE SHIRT CO.
I.J. DEWHIRST	I.J. DEWHIRST
DRUMMOND GROUP	DRUMMOND AND CO. LTD.
DUNSFORD WESLEY LTD.	DUNSFORD WESLEY DUNSFORD WESLEY CLOTHING LTD
EDWIN WOODHOUSE & CO. LTD	EDWIN WOODHOUSE & CO LTD.
ELSIE WHITELEY	ELSIE WHITELEY J.G. MALLINSON
EXECUTEX CLOTHES PLC	EXECTUTEX CLOTHES LTD.
S.R. GENT	S.R. GENT
H.G. GRAHAM & SON	H.G. GRAHAM & SON BRADFORD BIAS BINDING CO.
HAROLD P BARBER & SONS	GLENHUSKY OF SCOTLAND
J.G. INVESTMENTS LTD.	CASTLETEX CLOTHES LTD.



JOHN CROWTHER PLC.  
(COLOROLL GROUP)

KAGAN TEXTILES

W. LAMB & CO. LTD

LINCROFT KILGOUR GROUP

LUKE HOWGATE & SON.

MARSDEN FASHIONS LTD.

MARSYLKA MANUFACTURING CO LTD

MILETA SPORTS LTD

PARKLAND TEXTILE HOLDINGS

READICUT INTERNATIONAL

READSON LTD.

ROWLAND GAUNT

SUMRIE CLOTHES PLC

WAKEFIELD SHIRT CO.

WILLIAM GRAHAM & SONS.

GRANTWEAR LTD.  
J.W. MYERS LTD.  
MYERS BROTHERS  
REGINA FABRICS  
DADON INTERNATIONAL

KAGAN TEXTILES.

W. LAMB & CO LTD.

HARRISON GLOUCESTER CO. LTD.

LUKE HOWGATE & SONS.

MARSDEN FASHION LTD

MARSYLKA MANUFACTURING CO. LTD.

MILETA SPORTS LTD.

MAITLAND MENSWEAR  
MAITLAND WOMENSWEAR

CELAIRIC LTD.  
SAMUEL TWEED & CO. LTD.

CHARLES BARKER (LEEDS) LTD.  
ZIMMERMAN BROTHERS LTD.

BEAU BRUMMEL LTD.

SUMRIE CLOTHES

DOUBLE TWO  
WILLIAM SUGDEN & SONS.

WILLIAM GRAHAM & SONS.

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