

A STUDY ON THE ACTUAL COMPETITIVE CAPACITY OF THE SMALL AND MEDIUM TEXTILE AND GARMENT ENTERPRISES IN THE CENTRAL KEY ECONOMIC REGION

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Abstract

The Study evaluates the competitive capacity of the small and medium textile and garment enterprises in the Central Key Economic Region (CKER). The Study also proposes solutions for maintaining and improving competitive capacity of those enterprises in CKER. The Study utilizes both quantitative and qualitative methods. The outcome is the successful development of the evaluation system of the actual competitive capacity of the small and medium textile and garment enterprises in CKER. Based on the outcome of the study, some factors have been proposed in order to enhance the competitive capacity of the small and medium textile and garment enterprises in CKER.

Keywords: *Competitive, Capacity, Textile and Garment, Central Region*

1. Introduction

The CKER including five provinces and cities under the central government: Thua Thien Hue, Da Nang, Quang Nam, Quang Ngai, and Binh Dinh has been oriented to become a dynamic region which creates jobs, improves the live and literacy of the people and, at the same time, makes a base for the development of the provinces in Cetral Coast Region and Tay Nguyen. In that orientation, the textile and garment industry is one of the key factors for the industrialization and modernization of the local areas. However, the textile and garment industry also have a strong international characteristic and is one of the industries that face increasingly strong competitiveness not only in Vietnam but also worldwide. The existence and development of these enterprises depend mostly on their competitive capacity which is a hot issue that attract attention of the company managers and the local authorities when it comes to enhancing the competitive capacities of Vietnam and local areas. Thus, the question is how to measure the competitive capacity of these enterprises and to find out the influential factors and propose solutions for sustainable competition. The Study is conducted in order to meet the goal of designing a evaluation system to assess the competitive capacity of the textile and garment enterprises that can be applied to the research region which is the CKER. The Study has formed a system of reasonable solutions to maintain and enhance the competitive capacity of the small and medium textile and garment companies in CKER.

Since the theories in economics were studied in a serious and systematic manner, competition has been viewed in a more academic way. Although studies on the competition in the economy in general and among the enterprises in particular have been conducted for quite a long time but the term competitive capacity and its relevant researches are still rather new. A lot of researchers believe that the studies on competitive capacity started as early as in the 70s and that they have only developed strongly since the 90s. Due to the outbreak in the 90s, the studies on competitive capacity have been quite abundant. Through those studies, we can sum up with some of the followings:

** Levels of the studies on competitive capacity*

In the studies on competitive capacity, the definition of competitive capacity has been studied at three levels: National Level, Sectional Level, and Enterprise Level (and at product level)

At national level, you might encounter the definitions on national competitive capacity, evaluation criteria on national competitive capacity in the Report of the Committee of Industrial Competitiveness by the American president.

At sectional level, countless studies have been released on the Internet. Say for example, the studies by [2]

At enterprise level, you can found the studies by [4]; [3]; [1]

With its research purpose, the Study emphasizes on the competitive capacity at enterprise level.

By a blueprint theory on evaluating the competitive capacity and analyzing the factors affecting the competitive capacity of textile and garment companies, the Study needs to clarify the following matters:

+ the evaluation criteria equivalent to evaluation components: Competitive Outcome and the Competitive Potential that can be used to evaluate the competitive capacity of the enterprises in the study scope is a key economic region. Since the scope of evaluation is quite large, the evaluation criteria must not only reflect the competitive capacity as defined but also ensure the feasibility of the evaluation in reality.

+ The factors among the 6 groups of factors of the Diamond Model are considered to have real impact on competitive capacity of the enterprises in the study scope which is a key economic region. The quantitative importance of the factors are also determined.

2. Method

The Studied is conducted via a collective method: Combining quantitative and qualitative methods

+ Quantitative method: Studying the basic theory and expert interview

+ Qualitative method: using the method of statistics and description on Excel, index method, ANOVA analysis on Excel

3. Results

3.1. Evaluation on Competitive Capacity of the Small and Medium Textile and Garment Enterprises in the Central Key Economic Region

Here, the competitive capacity of the small and medium enterprises is evaluated on two aspects: Competitive result and competitive potential. With the competitive result, the evaluation criteria to evaluate competitive capacity consist of: Revenue growth speed, ROE, and average growth per labor (VA/L); on customer satisfaction which is evaluated via market share and on employee satisfaction which is evaluated via average income instead. On competitive potential, competitive capacity will be assessed via indexes of performance, unit labor cost (ULC), unit price and rate of inventory (in total assets) and unit price.

** Evaluation of Competitive Capacity of Small and Medium Enterprises against the Large ones in the CKER*

*** Evaluation of competitive capacity on the aspect of competitive result*

① On financial aspect

Average growth in revenue

Achieving a certain amount of revenue shows the effort of the enterprise on the two aspects: Persuading customers to buy a certain product with a preset price which both show the competitive efforts of the enterprise against its competitors. Expanding the revenue shows the success of the enterprise on those two aspects.

Since the limited data doesn't allow the evaluation of revenue growth of each enterprise, the average revenue will be determined using the following formula:

Average revenue = total revenue / total number of enterprises

Since an enterprise might operate more than one products, only revenue on textile and garment is considered. With the collected revenue, the revenue growth of the small and medium textile and garment enterprises is summarized in Table 1.1

Table 1.1: Average growth in revenue of the textile and garment enterprises in the CKER (based on enterprise's scale) in 2018-2020

Index	Year			Growth rate (%)	
	2018	2019	2020	2019 against 2018	2020 against 2019
Small and medium enterprises					
+ Number	67	63	108		
+ Revenue	118714	142703	477485.3		
+ Average revenue	1771.851	2265.127	4421.16	27.84	95.18
Large enterprises					
+ Number	26	36	40		
+ Revenue	2267672	2891951	7836888		
+ Average revenue	87218.15	80331.97	195922.2	-7.90	143.89

(Notes: The revenue is million Vietnamese Dongs)

(Source: The author used the resources of General Statistics Office of Vietnam)

Thus, as far as revenue is concerned, the average expansion in scale of the large enterprises in 2019 seemed to be less than that of the small and medium ones. However, in 2020, the large textile and garment enterprises made quite a change as they achieved much greater revenue growth compared to that of the small and medium ones.

Return on Equity (ROE)

The assets of enterprise sponsored by owner equity and debt. In 2019, the small enterprises used 111.589 billion Dongs equity for doing business. In 2020, this became 165.2826 billion Dongs While with a much larger scale, the large enterprises invested 661.377 billion Dongs of equity into business in 2020. And this capital of the large enterprises increased rapidly in 2020 which was 1426.863 billion Dongs. However, in both of these years, some of the enterprises had negative equity meaning that their business activities were completely funded by debt due to high ratio of loss in revenue for a long time.

In general, the large enterprises in 2019 and 2020 had better competitive capacity compared to the small ones as far as equity's profitability is concerned and this is shown in Table 1.2.

**Table 1.2: ROE (%) of the textile and garment companies in the CKER
(Based on scale)**

Some sorted statistic criteria	2019		2020	
	Small and medium companies	Large companies	Small and medium companies	Large companies
Average	-5.32	3.92	3.41	24.43
Minimum	-174.16	-86.76	-185.55	-93.99
Maximum	67.62	121.60	152.94	129.85

(Source: The author used the resources of General Statistics Office of Vietnam)

The above table was conducted based on the sorted data which excluded the spasmodic ones which made the difference in ROE between the enterprises too big. In particular, among the small and medium enterprises in 2019, two companies in Da Nang and Quang Ngai were excluded since their ROE were 848.68% and – 237.05% respectively. Similarly, among the large companies in 2019, the two large companies in Da Nang with ROE of -561.20 and 433.51 and one company in Quang Ngai with ROE of 70200 were not included in the Study. In 2020, one textile and garment in Da Nang was excluded since its ROE, which was -822.97%, was too low. Although some cases were removed, Table 1.2 shows that the enterprises from two groups have great variance when it comes to ROE and high heterogeneity

The Table shows that in 2019 the equity's profitability of the textile and garment enterprises was quite low with an average of -5.32%. Though most of the enterprises in this group have ROE greater than -5.32% (skewness = -2,53) and high concentration (kurtosis>0), some of them still have extremely low ROE which makes the average ROE go down. Also in this year, the large enterprises had ROE ranging from -86.76% to 121.60%. Some of them had ROE smaller than the average which is 3.92% (skewness = 0,92) and high concentration (kurtosis = 8,10).

In 2020, ROE of both groups increased sharply, especially the large enterprises. With a variable from -185.55% to 310.44%, ROE of the small and medium companies falling around 3,41%, mostly under. Meanwhile with a range form -93.99% to 129.85%, the large enterprises reached a much greater average of ROE: A spasmodic increase of 24.43% due to increase in revenue and funding. However, most of the enterprises in this group have a ROE lower than the average (positive skewness) and a small concentration (positive kurtosis)

ANOVA analysis was used to verify the difference in average ROE between these

groups. With a P-value of 0.201, assuming there is no real difference in average ROE between two groups in 2019. However, in 2020, P-value = 0,037 < 0,05 allows the conclusion that the factor of scale has impact on ROE or, in other words, the large textile enterprises has greater ROE compared to the small and medium ones with a mean of 0.05.

Value Added per Labor (VA/L)

With the statistics calculated in Table 1.3, average VA/L created in the large enterprises were greater than that of the small and medium enterprises and this was clearly shown in 2020. Thus, generally, the competitive capacity on value added creativeness of the large textile and garment companies is higher compared to that of the small ones and in CKER.

In particular, it can be seen that the index in the large enterprises has greater variability compared to that of the small and medium ones and the uniformity is also lower. The value of the variables shows that in 2019, most small and medium enterprises has VA/L smaller than 16.179 billion Dongs and less than 28.204 million Dongs in 2020. That also means that some of the enterprises in this group has extremely high VA/L which leaves strong impact on the avarege value. Meanwhile, most of the large companies had VA/L greater than 19.67 in 2019 and less than 41.729 million Dongs in 2020. Similar to the group of small and medium textile and garment enterprises, there were some in the large company group had VA/L much higher compared to others in the same groups.

**Table 1.3: VA/L (million Dongs) of the textile and garment enterprises in the CKER.
(Based on scale)**

Some sorted statistic criteria	2019		2020	
	Small and medium companies	Large companies	Small and medium companies	Large companies
Average	16.179	19.267	28.204	41.729
Minimum	-8.251	-41.897	-22.214	-43.963
Maximum	44.567	45.725	73.838	130.732

(Source: The author used the resources of General Statistics Office of Vietnam)

ANOVA analysis with a mean of 0.05, there is no characterized difference between average VA/L between the two groups of different sizes in 2019 (P-value = 0.213). However, this changed in 2020: P-value = 0.001 shows that the larges companies have greater VA/L than the small and medium ones. Thus, the large companies have greater competitive capacity compared to the small and medium enterprises in that aspect, with a mean of 0.05,

② On Customer Satisfaction

As mentioned earlier, based on the general expert interview and based on the real gathered data, the capacity to meet customer satisfaction of an enterprise is shown in the market share that it holds. A simplest way, considering the general demands for textile and garment products made in Vietnam (whether those demands come from Vietnam or internationally) to be met via revenue from selling those products, the market share, in its easiest way to calculate, is the total revenue of textile and garment product of Vietnam that the enterprise holds (Summarized in Table 1.4)

**Table 1.4: Market share (‰) of the textile and garment companies in the CKER
(Based on scale)**

Some sorted statistic criteria	2019		2020	
	Small and medium companies	Large companies	Small and medium companies	Large companies
Average	0.033	1.160	0.033	1.475
Minimum	0.001	0.064	0.000	0.067
Maximum	0.216	10.206	0.462	24.631

(Source: The author used the resources of General Statistics Office of Vietnam)

The statistics show the ability to gain market share of the large enterprises is much better than that of the small and medium enterprises not only in the scale but also in the ability to expand their market share. More detailed evaluations show that, in 2019, the market share of the small and medium enterprises in the region ranged from 0.001‰ to 0.216‰. Most of the enterprises in this group has a market share of less than 0.003‰ though some actually have a much better figure (skewness = 2,227). Many of them has the market share of approximately 0.003 ‰ (Kurtosis = 5,601). In 2020, the average market share of this enterprise group mostly stayed the same (approximately due to rounding) but the variability was great: from mostly 0‰ to 0.462‰. Most of the enterprises less than 0.033‰. The heterogeneity is also quite high.

Among the large enterprises, the variability of the market share was even greater, from 0,064‰ to 10,142‰ in 2019 and from 0,067‰ to 24,631‰ in 2020. The average market share was 1.475‰ but most of the companies in this group had smaller market share than that average figure. And there are some enterprises that have greater market share compared to the rest (skewness = 3,245). High standard of derivation shows that the uniformity among the enterprises of this group is rather low.

However, the question is whether large scale really causes high competitive capacity as far as market share is concerned. The verified result shows that the scale has extremely

strong impact on market share (in both two years, P-values are always greatly lower than 0.05) Thus, competitive capacity of the large enterprises is higher than that of small and medium ones when it comes to market share and this superiority has a mean of statistics with a mean of 0.05.

③ On Employee Satisfaction

The criterion used to evaluate the competitive capacity is the average income of workers in a year. The employee's income includes 1) salary and bonuses and 2) insurance. To ensure the accuracy in comparison, the enterprises which have too short time of operation in a year are eliminated. On that basis, the number of enterprises that are studied go lower.

Table 1.5: Average Income (million Dongs) of the Workers of the Enterprises in CKER (in scale)

Some sorted statistic criteria	2019		2020	
	Small and medium companies	Large companies	Small and medium companies	Large companies
Average	17.403	19.839	28.549	33.091
Minimum	10.000	11.690	4.342	13.832
Maximum	35.398	31.588	52.882	61.313

(Source: The author used the resources of General Statistics Office of Vietnam)

The garment industry requires a lot of labor. The most important factor to attract labor is income. On the the hand, the competitive result of a company is viewed in the eyes of the workers mainly through the income that they receive. Under this perspective, generally the large textile and garment enterprises have better competitive capacity than the small and medium one when the average income of the workers is distinctly greater. Table 1.5 shows that many small and medium textile and garment enterprises in 2019 had revenue lower that the average level (positive skewness) but the concentration is mostly that of average (kurtosis = 2,388). The low standard of deviation indicates high uniformity. In 2020 this criterion of the small and medium enterprises was distinct: Most of the enterprises had average income of worker greater than 28.549 million Dongs a year though there exist companies with pretty low income (negative skewness). However, the average income of worker among those enterprises are scattered compared to the average (negative kurtosis). Although there was great improvement but their competitive capacity is still lower that that of the large ones.

In 2019, most large textile and garment enterprises had average income of worker ranged from 11.69 million a year to the average which was 19.839 (positive skewness) and in 2020 many of them had average income of worker from 13.832 million a year to the average of 33.091 million a year but it is scattered compared to the average (negative

kurtosis). The highest income of worker was 61.313 million a year.

Based on the ANOVA analyzed result, with P-value of 2019 and 2020 both lower than 0.05 (0.042 and 0.03), we can confirm that the large textile and garment enterprises have greater competitive capacity than that of the small and medium ones as far as the income of worker is concerned. And that's one of the reason why, in reality, the large enterprises find it easier to recruit workers compared to the small and medium enterprises.

The evaluation result of the competitive capacity of the textile and garment enterprises in CKER has been summarized in Figure 1.1. It can be easily seen that the line of competitive capacity of the small and medium enterprises falls within the line of the large ones. This means the superiority in the aspect of competitive result of the large enterprises in the region, especially in 2020.

**** Evaluation of competitive capacity on the aspect of competitive potential**

Competitive potential is evaluated based on performance, unit labor cost, ratio of inventory in total assets and unit price.

Performance:

As described in the analysis of average revenue, in order for the data not to vary too much, the newly operated enterprises and the ones whose data cannot be collected (1 small company in 2020), only 51/63 of the small and medium enterprises, 35/36 of large enterprises in 2019 and 91/108 small and medium enterprises are studied statistically.

Table 1.6: Profitability (million/worker) of the enterprises in CKER

Some sorted statistic criteria	2019		2020	
	Small and medium companies	Large companies	Small and medium companies	Large companies
Average	37.112	60.091	58.851	97.627
Minimum	5.192	11.553	5.036	20.470
Maximum	257.375	329.636	395.923	639.995

(Source: The author used the resources of General Statistics Office of Vietnam)

Table 1.6 shows that in 2019 many small and medium enterprises have performance lower than the average which is 27.112 million (with a high concentration around the average) but there are some enterprises with extremely high performance. However, that average performance is still much lower compared to that of the large enterprises. In this group of enterprises, the performance ranges from 11.555 million Dongs to 329.636 million DONGs and most of the enterprises have their productivity around the average level of 60.091 million Dongs. Among these, there are some enterprises that have extremely high

productivity which affects the average performance of the group. In 2020, both of the groups had significant improvement in performance so the balance still remained unchanged. Some enterprises had had significant improvement in performance like 29/3 Textile and Garment Joint Stock Company had increased by 15% in 2020 compared to 2019.

The ANOVA analysis result shows that in 2019 the superiority of the large enterprises was not characterized. But that changed in 2020: With P-value = 0.017 < 0.05, it safe to day that there's difference in performance between the group of large companies and the group of the small and medium ones. In other words, the factor of scale affects the competitive capacity of the enterprises, as far as performance is concerned.

Unit Labor Cost

All garment enterprises who have statistics are put into analysis except for the ones with negative growth in net revenue. The elimination of these enterprises does not leave any effects on the comparison outcome. The result of analyzing ULC of the enterprises in the region is summarized in Table 1.7

**Table 1.7: ULC (in Dongs) of the enterprises in CKER
(Based on scale)**

Some sorted statistic criteria	2019		2020	
	Small and medium companies	Large companies	Small and medium companies	Large companies
Average	1.317	1.138	1.019	0.821
Minimum	0.453	0.575	0.455	0.326
Maximum	12.167	5.519	5.512	2.420

(Source: The author used the resources of General Statistics Office of Vietnam)

In 2019, the ULC of the small and medium enterprises changed from 0.453 to 12.167 Dongs and the uniformity was not high. Many enterprises in this group have ULC less than the average level which is 1.317 Dongs and a high concentration around this number but some have extremely high ULC compared to others (same skewness and kurtosis = 27.745). In that year, the competitive capacity of the large enterprises are higher appreciated since the ULCs of many enterprises in this group is smaller than the average which is 1.138. This average was affected by a few enterprises with outstanding ULC (same skewness).

In 2020 ULC of both of these groups fell but the large companies still showed better competitive capacity thanks to their efforts in effective use of labor. ULCs of the enterprises in this group fall around the average of 1.019 Dongs and the good thing is the number of enterprises with ULC less than 1.019 are quite many (same skewness) Meanwhile, average

ULC of the large enterprises is only 0.821. Some enterprises even had ULC less than the average level. The ULC concentration around the average level of the enterprises in this group is still high.

The analysis outcomes of the two years show that ULR of the large textile and garment enterprises is smaller than that of the small and medium ones but it doesn't have statistic mean with a mean of 0.05. Meaning to say that the factor of scale does not leave a strong impact on average ULC.

Inventory Rate in Total Assets

In the statistics and accounting figures of the enterprises include the inventory value including finished goods inventory, unfinished materials and products/work. Thus, the inventory rate in total assets reflect the effectiveness of various internal processes of the enterprises (incoming and outgoing logistics, management and production).

Table 1.8: Inventory Rate in Total Assets (%) of the Textile an Garment Enterprises in CKER. (based on scale)

Some sorted statistic criteria	2019		2020	
	Small and medium companies	Large companies	Small and medium companies	Large companies
Average	12.326	14.456	13.125	17.034
Minimum	0.000	0.000	0.000	0.000
Maximum	72.756	46.643	75.385	55.881

(Source: The author used the resources of General Statistics Office of Vietnam)

Table 1.8 shows that although there's a great variability, the small and medium textile and garment enterprises still have lower inventory rate compared to that of the large ones. However, the uniformity between the enterprises is low. In 2019, most of the small and medium enterprises have the inventory rate less than the average level which is 12.326% but there are some with the inventory rate accounting for 3/4 of the total assets making the average quite high. In 2020, since the product consumption of the enterprises in this group faced more difficulties thus the average inventory rate rose quite a bit.

The large enterprises have greater inventory rate comparing with the small and medium ones. The average inventory level was also influenced by only a few enterprises with an extremely high inventory compared to others. However, the analysis result shows that the factor of scale does not affect the average inventory rate with a mean of 0.05. Although the calculated result shows that, in general, the small and medium enterprises have better competitive capacity compared to the large ones, as far as inventory rate is concerned, this difference does not have any meaning for statistics.

Unit cost

As mentioned above, to ensure the comparability when the enterprises do business on many different products, the unit cost is an estimate: The number of Dongs to make a Dong of value added. The statistics of unit cost of the textile and garment companies in the CKER is summarized in Table 1.9

Table 1.9: Unit Cost (Dongs) of the Enterprises in the CKER (in scale)

Some sorted statistic criteria	2019		2020	
	Small and medium companies	Large companies	Small and medium companies	Large companies
Average	2.711	2.711	2.167	2.148
Minimum	0.448	0.847	0.530	0.791
Maximum	14.818	9.001	15.195	7.991

(Source: The author used the resources of General Statistics Office of Vietnam)

Not taking into account the one with negative value (one large enterprise in 2019 and 3 small and medium enterprises and 2 large enterprises in 2020), the calculated figures show that there's no significant difference in average unit cost. However, among the small and medium enterprises, many of them have unit cost higher than the average level in comparison with the large ones (skewness is much higher). The evaluated result also shows that there is no real difference in average unit cost between the two groups of enterprises. The positive side here is the average unit cost of both groups has the tendency to decrease which shows their efforts in cutting costs.

Generally, based on the average value of the evaluation evaluation, the large textile and garment enterprises have higher competitive potential compared to the small and medium ones. The large enterprises seem to show their weaknesses in consuming products and material inventory.

3.2. Some Solutions in order to Improve Competitive Capacity of the Small and Medium Enterprises in CKER.

By studying actual competitive capacity of the small and medium textile and garment enterprises in CKER, the author proposes some solutions to improve competitive capacity of these enterprises as follows:

** Solutions from local textile and garment enterprises*

*** Market diversification and product diversification*

in 2019 and 2020 the Indian textile and garment industry had significant advancement since, in addition to America, EU, Japan which are targeted by most of the

textile and garment exporting countries, it had turned to Russia which brought it a high exporting value. Returning to the CKER, many enterprises are lucky enough to achieve good revenue growth with positive ROE since they not only look for new exporting markets like Korea, Cuba, East Europe, South America, Middle East, and so on but also take good care of the domestic market. Obviously, the right decision related to the market is also a solution for enhancing their competitive capacity. Besides, providing the market with suitable products is a way to enhance that competitive capacity.

**** the large enterprises focus on the domestic market:**

With the domestic market, the large enterprises might apply OBM and ODM methods. They can provide their own branded products to the customers who tend to use Vietnamese products and care about the standard or value of the products.

**** The small and medium enterprises who tend to export their products:**

With this group of enterprises, the ability to invest on brand and material storage is not that good due to limitation on resources. And the best solution for them is OEM and/or CMT methods.

**** The small and medium enterprises who focus on the domestic market:**

These enterprises can follow the model of the large enterprises: Making their own branded products (ODM) to attract the customers with low income who choose a more economical products. Besides, they can become the OEMs and CMTs of the domestic textile and garment enterprises. They actually prefer to be OEMs and CMTs.

**** *Performance improvement and cost reduction***

With the unpromising predictions on the world's economy in the coming years, the customers in the major markets like EU, America, and Japan seem to tight their budget on many products, including clothing.

**** Deduction of lead time**

Lead time is the required period from order receival and product delivery. This requirement is increasingly important since the textile and garment industry tends to be associated with the fashion trend.

4. Discussion and Conclusion

In recent years, the development of economy and society in the CKER has always played an important role in the development of the Central Coast Region. The function of the region still remains in the future. In that development, the textile and garment has always held an important role in many local areas. Thus, the competitive capacity of the textile and garment enterprises is not only a hot issue to the enterprises themselves but to the local management. For all of the above-mentioned content, we can summarize some findings of

the study as follow:

** The Result of the Study*

+ Choosing a set of criteria to evaluate the competitive capacity and the factors affecting the competitive capacity of the textile and garment which is applicable and suitable with the research scope which is the CKER based on the fundamental opinions of some of the managers of some specific textile and garment enterprises, the governmental officials in the industry and some of the researchers on garment and textile as well as consultation with the authorities on the feasibility of collecting actual data.

+ Proposing approximate evaluation of the actual competitive capacity of the textile and garment enterprises on different aspects with the methods: Based on the characteristic data of different groups of enterprises with distinct features; showing the difference in competitive capacity between the textile and garment enterprises of different scales, different economic sectors and in reference with the similar enterprises in the South Key Economic Region and North Key Economic Region (3 fundamental factors affecting the competitive capacity of the textile and garment enterprises in the CKER). That difference has been verified in a simple way by using ANOVA analysis

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