

## จุดพลิกจากวิกฤตสู่ความเติบโตที่ยั่งยืน : โอกาสทางการพัฒนาของธุรกิจผู้รับจ้างผลิตเสื้อผ้า ตามแบบและตราสินค้าของลูกค้าในประเทศไทย

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### บทคัดย่อ

เป้าหมายการวิจัย คือ การวิเคราะห์ธุรกิจเสื้อผ้าของไทยโดยใช้แนวคิดเกี่ยวกับความสามารถทางการแข่งขันของไมเคิล อี พอร์เตอร์ และเสนอวิธีการที่เหมาะสมในทางปฏิบัติเพื่อการสร้างความสามารถทางการแข่งขันของผู้รับจ้างผลิตตามแบบและตราสินค้าของลูกค้า โดยข้อมูลเชิงลึกจากการเลือกกลุ่มตัวอย่างสัมภาษณ์แบบเจาะจงในช่วงปี 2014-2016 และข้อมูลที่เกี่ยวข้องจะถูกวิเคราะห์ในเชิงพรรณนา การศึกษาพบว่ามีจุดอ่อนหลายประเด็นในด้านต่างๆของแบบจำลองเพชรโดยเฉพาะการเพิ่มขึ้นของค่าแรงโดยเปรียบเทียบ การขาดแคลนแรงงาน การขาดแคลนปัจจัยพิเศษจำเพาะอุตสาหกรรม อุปสงค์ที่ขาดมิติความซับซ้อน ความเชื่อมโยงในห่วงโซ่อุปทานที่ไม่เข้มแข็ง และการเน้นใช้กลยุทธ์การตัดราคาในการแข่งขัน ในขณะที่จุดแข็งมีจำนวนไม่มากนัก ได้แก่ ทักษะฝีมือแรงงานที่ดี และบริษัทที่บริหารงานเชิงรุกบางแห่งมีทักษะการประกอบการและเครือข่ายธุรกิจในแนวตั้งที่เข้มแข็ง ทั้งนี้เพื่อความอยู่รอด ผู้รับจ้างผลิตเสื้อผ้าของไทยควรมุ่งเน้นที่การยกระดับทักษะแรงงานและความคล่องตัว ควรพัฒนาระบบการจัดการข้อมูล การรักษาความลับ นวัตกรรมพื้นฐาน การวางแผนร่วมและสร้างความร่วมมือเชิงลึกกับลูกค้าหลัก การวิจัยพฤติกรรมของลูกค้าหลัก และความเชี่ยวชาญเฉพาะที่เหมาะสม

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## A TURNING POINT FROM CRISIS TO SUSTAINABLE GROWTH: THE DEVELOPMENT OPPORTUNITY FOR CLOTHING OEM BUSINESS IN THAILAND

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### Abstract

The research purposes were analyzing Thai clothing business under the concept of Michael E. Porter competitiveness and providing realistic methods to nourish Original Equipment Manufacturer (OEM) competitiveness. The In-depth data from purposively sampling interviewees in 2014- 2016 and related data were descriptively analyzed. There were many weak points in each diamond model facet especially higher relative wage, labor shortage, scarcity of specialized factors, unsophisticated demand, feeble supply chain linkages, and orientation of competitive strategy towards price cutting. A few strong points were nice labor handiwork skill as well as solid entrepreneurial skill and private vertical business network of some progressive firms. To survive, Thai clothing OEM should center on raising labor skill and agility. Data management system, secrecy concealment, and basic innovation should be promoted. Co-planning and in-depth collaboration with main customers, as well as research on their behavior should be fostered. Appropriate type of specialization should also be developed.

**Keywords :** Clothing Business, Competitiveness, Original Equipment Manufacturer

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## Introduction

In the past, Thai entrepreneur in clothing industry gained enormous profit based on high labor intensity in clothing production process, low barriers to entry, quotas under Multi-Fiber Arrangement (MFA), and the other preferential trade treatments from developed nations. The labor-intensive technology of clothing production matched exactly with labor abundance. However, since mid-1990s, the situation had gradually turned to the opposite 180 degree. Moreover, the most of public and private organizations related to clothing business development were believed to focus on short-term business interests such as being lobbyist on terms of trade, investment, taxation, and subsidization. Sasin (2003a: 114) found that the roles as accelerators to long-term business competitiveness enhancement and cluster development were quite limited, incomplete, and sometimes misleading. Amid dynamic lost in general clothing business, some enterprises could sustain high rate of capacity utilization under progressive management which frequently adopted modern technologies, business practices, and value-creating strategies. The cheap labor cost was not the sole competitive factor, but many other man-made factors were relevant. After a sharp contraction in mid-1990s, gradual export recovery of the overall clothing industry could be seen amid long-term Thai baht appreciation trend since late 1990s. This pointed to some structural changes in Thai clothing industry. Therefore, it was interesting to analyze Thai clothing industry in the dimension of international competitiveness. This research focused on the Original Equipment Manufacturer (OEM) business because the most of Thai clothing firms persistently relied on this business model. In the near future, the international trade and investment obstacles of clothing business could be removed wider and deeper, so clothing OEMs must have a guideline for improvement amid intensified competitive pressure.

## Objective

Our main objectives were analyzing Thai clothing business under the concept of competitiveness and providing practical ways for clothing OEM to develop competitiveness.

## Methodology

Theoretical concept of competitiveness or the diamond model provided by Michael E. Porter would be used for analyzing Thai clothing business competitive environment and the realistic method to nourish Thai clothing OEM competitiveness. The purposively sampling interviewees in the period of 2014-2016 were highly experienced persons in clothing business. Flexible interview guides in the topic of clothing business competitiveness and practical ways for clothing OEM to develop competitiveness were used to let interviewees reveal their own experiences with minimal biases originated from differences in experience of interviewer and interviewees. The data from in-depth interviews would be collected. Then, we descriptively

interpreted in-depth interview data under the assumption that Thai clothing business was a small part of the global clothing industry.

Thai clothing diamond model would be identified first. The diamond model revealed clothing industrial environment and potential competitiveness development opportunity for Thai clothing OEM. Then, description of clothing OEM's development methods based on local diamond were reported. This last step spotlighted key economic activities that should be done for survival.

There were 7 main interviewees (namely A,B,C,D,E,F,G). We gradually collect interview data in the period of 2014-2016. In September 2016, there was a plant visit that provided additional data by some workers and 3 operational managers. For the reason of protecting personal privacy of informants regarding to providing internal data and business secrets, we had to conceal their names and related organization titles. Interviewee A and B worked as lecturer and researcher in the field of textile and apparel for more than 2 decades in a well-known university. Interviewee C managed own clothing firm for more than 3 decades. He handled the largest OEM share in a special kind of clothing, which largely dealt through bidding system. Interviewee D worked in the field of export garment for more than 2 decades. He was now senior secretary for an owner of a frontline clothing OEM. Interviewee E and F were retired clothing SME owners. Interviewee E worked as pattern maker and representative plant manager in Original Design Manufacturer (ODM) plant for about 10 years before opening own garment business. Interviewee F made own design, hired local cutting-making-trim (CMT) plant, and wholesaled through own shop, before shifting role to be importer in early 2010s. Interviewee G had more than 2 decades experience in export-oriented OEM business. He was a leading entrepreneur who did OEM function for global-branded buyers and being among leading group of businessmen who did outward FDI. Finally, for the plant visit, we interviewed with plant manager, sewing line manager, floor manager, and some operational workers. Formerly, this plant was export-oriented OEM. In 2013, it was taken over by local-focused OEM. So this interview provided dual OEM data related to both export and local market.

Regarding to the theoretical concept of Porter (1990), competitiveness was the ability of a firm or industry to deliver the consumer valuable product over its competitors. Source of competitiveness were interrelated set of domestic advantages and competitive pressures. Porter created a diamond, the virtual image of competitive factors, which a firm would encounter as its environment in competition. It composed of 4 primary facets that directly determine productivity creation dynamics including, factor condition, demand condition, related and supporting industries, as well as firm strategy, industry structure, and rivalry. The other 2 important factors including government and chance would also affect the overall diamond and the way of competition. The chance events were occurrences that have little to do with circumstances in a nation and were normally beyond the power of local agents to determine.

Sasin (2003a: 43) suggested considering role of government and chance on competitiveness in term of factors that work via 4 fundamental forces. So this research explained role of state agencies and chance through 4 primary determinants to smooth analytical description and highlight the channels that they pass their effect to clothing business's environment.

## Result and Discussion

**The factor condition:** Before 1990s, labor abundance and neat handiwork skill supported fast expansion of clothing export, but after 2000s, labor abundance was not advantage anymore. To relieve the impact of labor shortage and rising relative wage rate, interviewee E said many firms chosen to employ foreign labors. But labor problems were not ultimately solved. Interviewer B said many firms offered rather unattractive wage, working condition, and future job prospect to Thai labor especially talented persons. Fortunately, clothing firms had benefited from nice labor skill. Interviewee A said average handiwork skill in CMT, arranging composition, and decoration, of Thai workers was higher than the most of its emerging rivals, such as China, Bangladesh, Cambodia, and Vietnam, but lower than a few rivals like India and Peru. Rising wages in Thailand might lead to higher clothing price offering. No matter how, even pricing was important, but the highest price quotation might not always eliminate all chance to get order. The practical procurement method had gone beyond focusing only on roughly defined product, but it increasingly centered on thoroughly defined product and related process. Sometimes, labor abundant nation might lose orders due to other factors, like political instability and low CMT quality, as seen in 2016 Cambodian wave of garment plant shutdowns (Prachachat Online, 2016).

There were obstacles in developing labor further. Interviewee B said ability to develop specialized human input was limited and newly graduates' proficiencies did not exactly match with employers' needs. Thai educational budgets was large relative to other Asian nations (Sasin, 2003a: 49), but the result was disappointing. There was not nice condition for designer incubation as strong fashion culture and advanced fashion institutions were critically required. International networks for branded clothing distribution were also in the early stage of development. This explained why Sasin (2003a: 75) found that most of Thai clothing firms could not go beyond being OEM. Furthermore, fund raising was also a weak point. Reliance on money market inclined to be high-cost as clothing business was judged as a sunset industry. In equity market, there was not any significant capital raising for more than 2 decades. In addition, only basic infrastructures could be found, while specialized advanced items were scarce, such as specialized research center, prototype plant, fashion exhibition center, and professional service center. Besides, in spite of developing own technology, Thai clothing firms mostly chosen imported technologies, but ability to absorb them was constrained by weak knowledge bases.

The absorption rate of new technology was low compared to the other ASEAN countries (Sasin, 2003a: 69-71).

**Demand condition:** Local demand condition was generally identified as unsophisticated in the aspect of required quality and product standard, partially because of ill income distribution and compromising tradition. Even local market was sizeable, but it was mostly low-end (Sasin, 2003b, 229). Critical purchasing criteria was pricing, while middle-class consumer preferred to buy mid-to-low priced fast-fashion clothing than the premium items. Unqualified local demand was not a good basis for competitiveness upgrading as many consumers strongly denied to buy premium quality clothing sold at appropriately quoted medium-to-high prices. They had limited budget and centered on use value instead of fashionableness. The space of value creation via high technology and fashion contents was restricted. Local demand was quite useless for predicting demand in richer developed countries. Even clothing for summer season and costumes made of Thai traditional fabrics might receive more than normal attention from Thai consumers (Sasin, 2003a: 128, 161), but its effect on increasing competitiveness in global arena was limited.

Foreign demand seems to be vital for development by targeting at shifting from low-cost producer to the first tiered supplier of high value-added clothing. Empirically, foreign demand would support competitiveness development when foreign demand sophistication could pass through its essence to local firm's core management methodology. Aggressive unionization deeply with foreign buyer's value chain organism should be a necessary condition for success. Most of Thai apparel firms had limited ability to directly penetrate into foreign market, so enhancing distribution networks with partners or buyers was essential. Interviewee G opined that the efforts to develop own brands and selling channels abroad were largely wasteful because of difficulty in undertaking subtle tasks related to fashion clothing.

**Related and supporting industries:** Thai clothing industry had long-lastingly encountered with problems of coordination vertically along local supply chain and horizontally with other related businesses and institutions. Firm-specific business linkages must be privately formed vertically to let value creating mechanisms operate their daily tasks without effective governmental support. Systematic horizontal coordination among clothing firms, academic institutions, state agencies, and related businesses, was just in the early stage. Empirically, interviewee C and a plant manager said coordination between clothing plants and local textile product suppliers had repeatedly generated day-to-day problems. Local textile quality and timeliness of delivery were among the most concern issues. In addition, some kinds of textile products and accessories could not be qualifiedly produced locally at reasonable cost. Garment industry intensely used imported fabrics due to fabric quality, tariff, and delayed VAT refunding (Thailand Textile Institute, 2005: 1). The fragility of local supply chain partly reflected different business motives as firms located in different stage of supply chain acted like they were

members of different global value chains. For the upstream factories, it was strategically planned by co-investing multinational corporation (MNC) to allocate production site for each product variety in different areas around the world, so technically it broke supply chain within a host country apart.

A number of institution for collaboration (IFC) was found to enhance linkages. In the past, general IFCs' roles in strengthening cluster and competitiveness were limited, incomplete, and occasionally misleading (Sasin, 2003a: 114). While coverage of cluster-specific IFCs along supply chain was adequate, but mostly they focused on working for members' interest, not the whole local supply chain long-term mutual benefit. Besides, since 2000s, BOI and state industrial policy had oriented to cluster building, but modern clothing business, which intensively utilized creativity and management skill, was not in the top list. Thai clothing business was not sincerely supported (Kohpaiboon and Kulthanavit, 2011). There were high import tariffs of petroleum products, chemical substances, and dyeing color (Sasin, 2003b: 199, 233-235). Such distortions unintentionally incurred perpetual weakness in quality, variety, and reliability to bleaching, dyeing, printing, and finishing businesses. They had become everlastingly a bottleneck of local supply chain as the necessity of re-processing led to unreliability of textile quality. Re-dyeing was about 10-30% of total locally processed fabric (Thailand Textile Institute, 2005: 48). Based on interviewee C and data from a plant, recurring defects found in locally dyed textile products were false color shading, discoloration, and selvage-to-selvage shading. For textile printing, we could face with blurred, off-grain, off-position printing. Interviewee E said discoloration was mainly due to unqualified local dyeing color. While imported color was classified as mid-to-high quality color that some dyeing plants could offer dyeing quality guarantee to their customers.

**Context of firm strategy, industry structure, and rivalry:** Amid widening trade and investment openness in global clothing industry, many firms tried to further rely on factor advantage by moving production sites to rural or border line areas for cheap labor. They seized new order by price cutting periodically, or long-lastingly keeping profit margin at very low level. Interviewee E said profit margin of garment plants were roughly 10%, while tailoring clothing for local market gained better at 20% and 40% for basic and highly detailed clothing, respectively. Most of Thai fashion SMEs intensively utilized price strategy, but could not nicely employ advanced marketing and branding strategies (Sasin, 2003a: 161). Due to limited dimensionality of local competitive space, clothing firm should focus more on responding to fastidious foreign buying conditions. Procurement units from some major markets tried hard to create "flexible sourcing portfolio" that balanced cost, quality, and speed to the market (Thailand Textile Institute, 2002) as well as attaining overall buyers' strategies. Offering the lowest price might not get the order if other purchaser's requests were not fulfilled. This subtle foreign sourcing behavior would circulate more pressure to the overall supplier's value chain. Complete improvement and reconfiguration of the overall local supply chain should be troublesome,

costly, and risky to be fruitless, while sharpening ability to integrate with each characterized group of buyers would be more practical.

Interviewee G said since 2000s, his OEM plant had enjoyed unceasing flow of orders from MNCs who hold globally famous brand portfolios. His plant was running at full capacity, while many firms managing with outdated strategies went bankrupt. He had close collaboration and strictly comply with buyer's code of conduct. Periodic investment in advance production and management system were done beyond buyers' requests. Local materials were intensively used under buyer's approval which pointed to efficient vertical private networks amongst the broad picture of quite fragmented local supply chain. Interviewee A added that some prominent branded clothing firms extensively used local fabric and accessories. Interviewee C, pointed out that local textile suppliers could gradually send some parts of ordered materials which clothing plant could bit by bit process up to material availability to cut lead time. On the contrary, if we ordered fabric from abroad, we had to wait until the overall order completed and shipped. Interviewee C and interviewee G also hinted good practice for sustaining competitiveness. They said clothing firm's manager must work hard every day to inspect, detect, brainstorm, and solve trivial-to-radical problems. Types of problems ordinarily change day by day, so the measure to cope with them must be tailored speedily to limit risk and loss. To accept more upper market order, we had to welcome smaller minimum amount per order with wide variety of details and employ high-skilled labors, experienced floor managers, and proficient plant controllers.

**The development opportunity of Thai clothing OEM:** Based on deficient diamond, Thai OEM should fastidiously take cost-saving activities that were highly effective in elevating competitiveness and worthily cultivate from strength inherited from the past business operation. Clothing OEM should take action as follows,

Firstly, due to high labor intensity in OEM function, the internal work process and labor management must be centered on raising labor skill and agility. It would not only improve productivity, job delicacy, quality, speed of delivery, and loss control, but also brighten up possibility to get more profitable orders. Data from plant visit affirmed this belief. Managers said they tried diverse methods to improve efficiency in sewing lines and finally found out the best way. They chose to train sewing workers to be able to do various kinds of sewing jobs, being multi-skilled sewers. The evaluation and payment systems were adjusted from individual basis to team basis, leading to reinforcement of job learning and teamwork skill. Each team member would help each other, particularly in difficult sewing parts, to best complete team target. Reorganization of production line, work space, and floor plan could be done for more flexibility, being not limited by specific individual worker's skill. Multi-skilled experienced worker and keen team formation sharpened competitive edge because of greater capacity to accept complicated order and respond to modern sourcing pattern.



Secondly, frequent basic, but breakthrough, innovations could support deepening roots in global clothing value chain. In the plant visit, plant manager said gradual nonstop innovative effort focusing on small matters all around the business process should be suitable for clothing firm amid capital scarcity and unreliable demand condition. For example, her plant invented a sheet for daily activity target achievement calculation and a scoreboard pattern for recording monthly accumulated errors found in the piece work of each worker (who was responsible for specific sewing part). Utilizing these innovative tools, weak point would be fairly highlighted and improvement measure would be accurately initiated. Moreover, interviewee A said some local clothing SMEs tried to apply Thai traditional fabric in modern clothing even foreign buyer acceptance might be limited in the early stage. While interviewee D said some large exporting OEMs were forced by MNC buyers to participate in their global value chain improvement process by delivering practical innovations in product, process, or equipment. Successful firm would receive higher score and possibilities to be moved up along supplier tier. They also occasionally invested in new production systems by themselves to avoid being left behind by peers.

Thirdly, a modern OEM should enhance data management, information technology (IT) system, and secrecy concealment. Interviewee D said it was global standard for qualified OEM not to release buyer's data. Buyer would execute ultimate punishment for data leakage as it might bring in huge loss from copying and rivals' counter measures. Good reputation in secrecy concealment added positive score in the eyes of sourcing agents. A firm should also improve internal data circulation and database management by utilizing modern IT in subtle issues such as executive administration, customer order arrangement, inventory processing, and production management. Interviewee G said he succeed in launching IT system for direct communicating with main MNC buyers which enable smooth flow of order making and dealing. But interviewee C and a floor manager said related software was costly and ability to fully use advanced IT was quite low. Extensive IT utilization in managing overall supply chain seemed to be unreachable. Interviewee D also suggested that normally foreign technology proprietors would try to avoid core information leakage. Even for advanced OEM exporter, foreign buyers rarely transferred advanced technology, R&D knowledge, or international network management method. They usually shared only as limited as possible knowhow to just fulfill minimum requirement for subcontractors to complete the buying orders. However, those little information received from foreigners should be kept in secret to raise the chance of getting more in the future.

Fourthly, co-planning and in-depth collaboration with main customer would be a most critical activity for pertaining competitiveness especially in buyer-driven clothing value chain. It would focus on production planning, delivery method, business risks alleviation measure, and buyer satisfaction enhancement by creating database for customer relation

management (CRM). Backward engineering should be done on the method which buyer used to cope with final consumer's preferences. The resulted algorithm would forecast behavior and pattern of buyer's demand, thus empower supplier to respond efficiently. To realize the way buyer used to maximize profit, both consumer's preference determinants and transformation method from preferences to effective demand should be known. The practical target would be reinforcing ability to serve buyer's business objectives and receiving upgrade into the first tier supplier.

Fifthly, an OEM should develop specialization to serve high potential buyer's particular requirements. This should be done when there were high economies of scope or sizeable niche market to absorb OEM's clothing for a rather long time period. Interviewee C said there were many factors which enable his plant to sustain leadership for a very long time. They were close relationship with buyer, careful financial monitoring, punctilious supervision of material procurement and utilization, speedy job completion within stressful delivery deadline, thorough quality inspection, and high proficiency in operating CMT on special type of fabric. His plant specialized in producing a kind of functional clothing which required special design, material, and production process. This specialized CMT was also applied on producing functional backpack and tent for outdoor events. There were proprietary minor innovations in production process and work flow management to be best fit with particular clothing production. To seize some market power and prolong competitiveness, OEM should eye on accepting orders which required meticulousness, quality guarantee, trade secret security, manufacturing swiftness, high product safety, limited delivery amount, natural friendliness, human right protection, and unique specialization. The whole business process, organizational structure, and activities operational method, should be appropriately reconstructed to effectively support firm strategies and satisfy buyers' requirements both in the aspect of final product and the whole related process.

## CONCLUSION

In this research, Porter diamond model was applied to analyze Thai clothing business in term of competitiveness. There were many weak points such as higher relative wage, labor shortage, unsophisticated demand, feeble supply chain linkages, and orientation of competitive strategy towards price cutting. Only a few strong points could be found such as nice labor handiwork skill as well as solid entrepreneurial skill and private vertical business network nourishment of some progressive firms. Thai clothing OEM had to very selectively take cost-saving, but highly effective in elevating competitiveness. They should center on raising labor skill and agility. Modern data management, IT system, secrecy concealment, basic innovation, co-planning and in-depth collaboration with main customer, backward engineering on chief buyers' behavior, and unique specialization, should be promoted.

## SUGGESTION

This research focused on how Thai clothing OEMs suitably respond to competitive environment, but we did not extensively go beyond to the issue of utilizing transnational business strategies by MNC. This skipped topic should be studied separately because MNC had different strategy choice set and profit maximization methodology than general clothing firm.

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