The Productivity Success Factors affecting to Competitiveness of the Readymade Garment industry in Sri Lanka

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ABSTRACT
This study is concerned with the analysis of factors that affect the Readymade Garment Industry in Sri Lanka and Its ability to compete within the global players. RMG industry has been the Sri Lanka's largest gross export earner ever since 1986 and accounted for more than 52% of total export earnings of the country. It is also the country’s largest net foreign exchange earner since 1992. Sri Lanka as a garment exporter has proven significant improvements in many aspects yet even at present, the quota system covers more than 52% of the country’s garment exports. However, Sri Lanka depends on quotas much less than other South Asian countries. Besides, dependence on the quota system, there are weaknesses in the domestic industrial and export structure, labor markets rigidities and strong competition in international markets. They need urgent attention for survival in a quota free market. Therefore, the future of the garment industry would depend on the competitive edges that Sri Lanka have over her competitors in Asia, Latin and Central America and emerging producers in Africa and Eastern Europe who benefit from favorable trading arrangements with major markets. This analysis shows that, phasing out of quotas will close down nearly fifty per cent of existing garment factories, as they loss that protection. However, some of the medium and large scale factories are expected to survive exploiting opportunities in the free market. Sri Lanka's garment industry is highly concentrated in large scale factories. That concentration will save a large part of export earnings while preserving job opportunities. Its contribution to net export earnings, however, has been somewhat low since the RMG industry is heavily dependent on imported inputs such as fabrics and accessories. For example, approximately 40% of all intermediate inputs used are imported. Finally, the RMG sector has been the driving force of employment generation in Sri Lanka as a labor intensive manufacturing sector, and it has been the single largest manufacturing employer in the country. The RMG exporting industry has been very important for the country not only as the main foreign income earner but also as the main employment provider. Therefore, the continuation of the industry without allowing to fall is a prime responsibility of the policy makers as well as industrialists involved in. Therefore, in this paper, it is attempted to identify the most important factors affecting to competitiveness and how they could be improved. Through the literature review, six most affecting factors were identified as Leadership, Research and Development, Team work, Investment, Efficiency of employees and Lead time. These factors in varying degrees are said to be affecting to the competitiveness of RMG industry of all the countries.

Keywords: RMG Industry, Competitiveness, Productivity Success Factors, Leadership, Teamwork, R & D, Investment, Lead-time and Efficiency

1 INTRODUCTION

The Sri Lankan Readymade Garment industry was developed in the late-1970s as an export-oriented industry following the introduction of the Open Economy Policy (Free Trade Economy policy ) in 1977. Over the last few decades it has shown a remarkable growth in terms of value of total exports. In 1977 the garment industry accounted for 2% of total exports, which had increased to 46% by 2005 (Central Bank Statistics, 2005). This growth has occurred within an industry structure where approximately 75% of companies are small to medium sized enterprises. Today the garment industry occupies a prominent position in Sri Lanka’s industrial structure. It is the largest employer amongst the country’s manufacturing industries, (with 42% of manufacturing employment (Board of Investment Statistics, 2009), and is the largest export earner (Kelegama, 2009) accounting for 69% of total exports (Board of Investment Statistics, 2009). The industry is also the country’s largest foreign exchange earner accounting for 46% of the foreign income to the country (Board of Investment Statistics, 2009). Therefore, the role played by the garment industry has been substantial in the Sri Lankan economy as a source of employment and earning foreign income. However, the industry has been losing its competitiveness in the global market due to various factors which needs to be reinstated sooner.

This prime aim of this paper is to examine the critical factors affecting to the competitiveness of the Readymade Garment exporting industry irrespective of small and medium sized enterprises (SMEs) in the Sri Lankan garment industry and to elaborate the practical and academic implications.

2 Procedure for Paper Submission

1.1 Purpose of the Study

The Sri Lanka has been enjoying some special tax tariffs from USA and EU called General System Preferences ( GSP ). These import tax slashed privileges have been very much useful to compete with world super powers readymade garment exporters to USA, EU. Nevertheless, these are highly conditional
and the country is required to follow their highly strict standards adapted. The GSP given by the European Union was suspended in 2009 citing that then government had not been in line with their guidelines and regulations. Since the new government took power in 2015, the GSP+ was granted again under very strict 28 conditions to be fulfilled. Owing to these privileges, the industry had been acceptably flowing without much challenges. Despite of these given privileges, there has been a big competition not only internationally but also within the exporting companies in Sri Lanka. The competitiveness has been much very important to the country to survive in the world and to compete among the individual companies in the country as well. On 31st of December 2017, the president of USA, one sidedly terminated their GSP concession given to 120 countries without giving any prior notice. Sri Lanka was a straight victim of that stubborn decision because USA has been the Sri Lanka’s biggest consumer for last decades. Due to the uninformed termination of the GSP concession, But again so banned GSP concession was re-granted to the same countries including Sri Lanka in April 2018 with effect of 22nd March 2018. Nevertheless Sri Lanka is required to export through big competition to enter in to the world biggest and richest market in USA. Therefore, to be competitive in the global market, Sri Lanka is required to improve their competitiveness of the Readymade Garment export industry. These are most important reasons why the study has long living significance. The prime aim of this paper is to examine the most critical factors affecting to the competitiveness of the Readymade Garment exporting industry irrespective of small and medium sized enterprises (SMEs) in the Sri Lankan garment industry and to elaborate the practical and academic implications.

1.2 Methodology
The deductive approach is followed in this paper. The arguments and explanations were mainly quoted from empirical evidences and related theoretical concepts. Together with authors reviewed journal articles and industry publications to relate the concept and applications related to the competitiveness. The literature review was completed in order to browse the related theories and applications based on the subject area which is very subjective in manner. In this paper it was attempted to identify the most affecting factors to the competitiveness and give insights to stakeholders to under the most affecting productivity success factors in order to enhance the competitiveness in the RMG industry locally and globally. The practices applied in Thailand were attempted to relate in the RMG industry in Sri Lanka with or without relevant modifications. It was attempted to organize the paper as a Concept paper while the arguments and applications were empirically related. Finally, some others factors that affecting to competitiveness is left for further investigations.

2.0 Literature Review

2.1 The Perception of Competitiveness
Saxena (2010) reported that according to the definition of the Organization for Economic Corporation and Development (OECD), the competitiveness of a Nation is “The degree to which a country can, under free and fair market conditions, produce goods and services which meet the test of international markets, while simultaneously maintaining and expanding the real incomes of its people over the long term.” Some scholars claim that nations themselves do not compete; rather, their enterprises do. There is no doubt that competitive enterprises are the main engines of a country’s competitiveness. However, over the past 30 years, the economic responsibilities of governments have for better or worse increased so much that it is simply impossible to ignore their influence on modern economies. Recent studies on employment by the OECD clearly underline the role of nations in shaping the environments in which enterprises operate, thereby influencing their competitiveness. A significant part of the competitive advantage of certain nations today stems from aggressive incentive policies such as tax breaks, subsidies, etc., which are designed to attract foreign investment.

2.2 Michael Porter’s Diamond Model
The competitiveness of any industry is very clearly explained by Michael Porter’s diamond model. Often there exist confusions about the competitiveness. The competitiveness is perhaps viewed and explained from a firm’s point of view and sometimes from a country’s point of view. However, Michael Porter showed his excellence in the diamond model by distinguishing the view of seeing the competitiveness (Brian & George, 2006).

Uddin (2014) says that In addition, Michael Porter raises “the relevance of the competitiveness of a country and concludes that the success of nations is largely due to the same circumstances that support the development of the most appropriate strategy for a particular sector. Explain that companies are in particular nations achieve international success since it is these that provide features to create and maintain a competitive advantage.

Similarly, in the case of Bangladesh, the country’s domestic or national competitiveness has a very influential effect and the relevant strategy to implement of the country’s those domestic competitiveness puts immense effect on the success of the Bangladeshi RMG industry. Vice versa, the success of Bangladesh as a nation would possibly come along with the success of country’s RMG sector.

Michael Porter’s diamond model has mainly four determinants and the determinants are inter-related to each other. The determinants are: firstly, factor conditions, secondly demand conditions, related and supporting industries is the third determinant and the last determinant among the four is firm strategy, structure and rivalry. However, the expansion of the model was seen when there two extra determinants namely chance and the role of government (John, 2007). When assessing the competitiveness of any industry, Conditions of the Porter’s diamond model need to be deeply analyzed in the light of real situations. The competitiveness is well explained by the Porter’s diamond model, and the competitiveness and productivity success factors essentially differ from industry to industry. But most of them still have some similarities irrespective of the industry concerned.
2.3 Competitiveness of clothing industry based on Porter’s diamond model

According to the paper written by Khan, and Reza (2015), theoretically factor conditions consist of basic as well as advanced factors. The basic factors are categorized as geographical conditions, natural resources, infrastructure, energy supply, basic labor force resources and financial market. The advanced factors consist of technical equipment, talents, and skills, enhanced education, innovation and capital operations. (Shanmuganathan, 2018) empirically proved there is no significant improvement observed in the index of Sri Lanka’s ranking shown in the past five years. India and Sri Lanka are ranked first for factor condition whereas Bangladesh and Nepal do not have very supportive factor conditions. The poor infrastructural facilities in both Bangladesh as well as Nepal caused for poor factor conditions. The two countries rank last and second last among the SAFTA countries for overall quality of infrastructure which is mainly because of poor quality of roads, air transport infrastructure. Comparatively India and Sri Lanka rank 1st and 2nd among the SAFTA countries for overall quality of infrastructure which is a reflection of the improvement they have made in railroad and air transport infrastructure in the case of India and quality of roads, air transport, and telecommunication in the case of Sri Lanka. Demand conditions are considered to be domestic demand and international demand. The continuation of increase of national income and resident’s income causes in an improvement in domestic demand for clothing. The indexes for the SAFTA countries for industry strategy, structure and rivalry reflects the fact that this factor has been grossly neglected in this regional group. There is very little or no clustering of the clothing with related industry. More competitive clothing exporters have developed “corridor” of L Shaped clothing industry with clusters of knitting manufactures, printing and dyeing, and firms producing accessories and embellishment and water washing mills etc. Besides this the management mechanism is not well organized. Leading brands. From all over the world use the SME privately owned firms in these low wage countries to outsource their productions because of the comparative advantage based on low wages. The related and supporting industries include clothing and auxiliary material supply, clothing machinery suppliers, specialized market for textiles and clothing, associations and agencies and development of ‘clothing clusters’. It is mandatory that a ‘Clothing export promotion councils strengthen the public private sector partnership with the objective of concurrently focusing on the three mains areas continuing to lobby for duty free market access in the USA, UK and Europe.

2.4 Key factors affecting to the competitiveness of readymade garment industry

Out of many influencing factors, Four factors, Teamwork, Leadership, Investment and R & D works were identified as the key factors affecting to the competitiveness of the apparel industry in Thailand by Charvalit and et al (2015). Thailand is quite different country than Sri Lanka since it is a nearly developed country. Therefore in the Context of Sri Lankan apparel industry, there could be more key factors affecting to the competitiveness of apparel industry. This is a very subjective in manner since it varies from region to region country to country, area to area, the kind of garments being produced etc. Therefore, it finds very difficult to apply common criterion. Instead some mostly affecting factors are to be identified in order to generalize. The in-born characteristics of the employees are identified to be very different from the country to country and area to area within the same country.

2.4.1 Satisfaction of employees

Syed (2015) in his paper Factors promoting work satisfaction of readymade garment (RMG) worker in Bangladesh: An empirical analysis identified work satisfaction of the readymade garments causes to improve the productivity enhancing the competitiveness.

According to paper published by Syed (2015), in Bangladesh about 4 million direct employees are working in the RMG factories. More than 80% of these workforce are women from different undeveloped rural area. Due to their unawareness of labor laws, regulations and standards, they are not aware of their own rights and the limits. Therefore, the labor dissatisfaction and unrest are highly affecting to the wellbeing of the uneducated less socialized works thus causing less productivity. In his paper, it was identified there are six variables i.e. medical facility, hygienic canteen facility, supervisor well behaves with worker, acceptable working environment, timely pay salary and admissible benefits and satisfactory amount of salary are significantly influence for the satisfaction of readymade garment worker in Bangladesh.

According to Ayub, Kabir, Uddin, A review of the garment industry shows that the availability of lower cost and standard quality products in Bangladesh are the two major strengths for Bangladesh to be very competitive in the global RMG market. The increase in production cost everywhere in the world is the main reason for the country’s headway in this. diversification of RMG exports depends on a variety of factors, including the level of technological development, natural resource endowment (e.g. cotton), international political diplomacy, destination countries’ trade facilitation policies (GSP) and the effects of economic integration.

2.4.2 Satisfaction of employees

Maeen and Akter, (2014) said that the lead time is the latency between the initiation and execution of a process. In RMG industry, lead time is the total amount of time required for completing a product beginning from the date of receiving the order to the shipment of the goods to customer. Time is a great issue in apparel trade as orders are based on particularly weather, seasons and occasions. Lead time therefore plays massive role, when delivering products to the respective outlets or to customers. Though Bangladesh is recognized as the second largest exporter of RMG to the world, The country still finds it very difficult to meet on time delivery schedules which causes adversely to the competitiveness. Not only in Bangladesh, but almost in all developing countries more less faces back-locks affecting the lead time in the RMG industry.
2.4.3 Satisfaction of employees

Bheda, Narag and Singla said that the RMG industry is a truly globalized industry where the time matters. RMG Manufacturing, which is heavily labor intensive has been invading developing countries from the developed countries. However, the developing countries need to have efficient manufacturing operations if they are to retain their competitiveness in the RMG industry. As per the British Institute of Management Foundation (BIM 1976), the term productivity explains productiveness of production, labor, and capital in the creating the sustainable wealth.

The factors affecting to the productivity according to paper by Bheda and et all.

- Level of technology
- Product style, price point and production volume
- Training of workforce and management
- Motivation level of workforce and management.
- Awareness of optimal production level
- High rate of non-first quality production
- Labor turnover and absenteeism
- Production scale
- Lead time
- Industrial Engineering and labor relations

Bheda, and et all concluded in their paper that the RMG industry is highly globalized and active equally both in developing and developed countries. However, the performance of the productivity drastically varies from country to country mainly due to their inherent or inborn qualities and life styles. If the developing is unable to improve their performances of productivity, the advantage of low cost labor is simply underutilized giving away the competitive advantage. This study has concluded that the India has almost 100% of productivity improving potential.

Kader and et all., said that though there are plenty of workers available in Bangladesh, the lack of skilled works is big concern. And when compared with other competitive countries like China, India and Pakistan, their productiveness are very low. Further it was clearly described that if China’s productivity is 100, that of Bangladesh is only 77%. Lack of the investment causes to lower the infrastructure such as new machinery and updated technologies with current insufficient size of skilled workforce has a great impact on the increase of the productivity. Further incompetent middle management is also major reason behind the low productivity of readymade garment industry. Most of the middle managers are without adequate previous industry experience and educational background of textile or apparel. Anywhere in the developing countries, old fashioned technology and technically incompetent managers are common practice in the apparel firms. Having communicated few of middle managers and some senior managers in Sri Lanka, following first hand information were identified in order to improve the productivity in the readymade garments industry.

Higher productivity brings higher margin in a business. And increment in Productivity level reduces garment manufacturing cost. Hence factory can make more profit through productivity improvement. There are several ways of productivity improvement that would certainly help factories to boost up current labor productivity. All the means that can be implemented as because most of these are within the company reach. Machine productivity as well as labor productivity increases when a factory produces more pieces by the existing resources (Manpower, time and machinery). So the productivity improvement plays a big role in improving the competitiveness.

Nimlaor and et all. (2015) have identified in their research article “AEC Garment Industry Competitiveness” that the factors affecting to the competitiveness of RMG industry in Thailand are categorized as follows.

2.4.4 Satisfaction of employees

Nimlaor and et all. (2015) said in their article that Katzenbach and Smith (1993) stated that “A team is a small group of people with complementary skills who are committed to a common purpose, performance goals and approach for which they hold themselves mutually accountable”. In addition, regular communication, coordination, distinctive roles, interdependent tasks and shared norms are important features. The team work more precisely, must be effective, they are organizational, individual and team function.

2.4.5 Satisfaction of employees

Based on the analysis of many researchers, business leaders must possess strategic vision abilities and set goals the organization can reach in short medium and long run. They must also have a strategy for use in both day-to-day and strategic operations. This ability will have an impact on the direction of the market, corporate performance and gross sales. It will also affect the success of product and services, cost recovery and the ability to retain customers and the controlling of operational costs. Leadership is more important when the task is more complicated and dynamic. Leaders are required to maintain well focused strategies to be in par with the organization’s vision and mission educating and evaluation achievement as and when required.

2.4.6 Satisfaction of employees

Other factors affect operations are investment size, total number of staff, equipment investment and tool technology. Machine technology and investment in its equipment is something that enhances the organization regardless of the size. Smaller companies investing in more sophisticated machine tools can enhance productivity, thus reducing their labor and contributing to better productivity.

2.4.7 Satisfaction of employees

Karaveg (2013) revealed in his paper that most new products from small and medium sized enterprises (SMEs) in the Thai textile middle stream industry were products of incremental innovation which had low rates of R and D investments with limited numbers of skilled workers in science and technology. Another study studied the impact of degree of skills, favorable working environment and R and D on manufacturing productivity of labor-intensive industries. The study concluded that a higher degree of skills, favorable working environment and R and D are important inputs to a labor-intensive manufacturing process which is positively associated with productivity.
3 CASE REVIEWS ON COMPETITIVENESS OF RMG INDUSTRY

3.1 Satisfaction of employees

The challenges that originate from changes in the global trade regime and the relative competitive environment in the global markets are reasons for deep concern for any country involving in the RMG industry. Because of quota system abolition many of the less efficient suppliers will lose quota rents and market shares as they are forced to compete with more efficient suppliers among developing countries. Since 1974, Bangladesh was enjoying a quota free access of garments under the Multi-Fibre Arrangement (MFA). But the phase out of the Multi-Fibre Arrangement (MFA) has completed in 2005 under the Uruguay round of GATT (General Agreement for Tariffs and Trade) in 1994. The freeing of trade in textiles and clothing has created a formidable challenge to the Bangladesh Ready Made Garments (RMG) Industry. The phase-out of the MFA, emergence of competitors such as China, India, Vietnam, Turkey, Mexico and African nations have negatively impacted on the fortunes of Bangladesh RMG sector. Dependence on imported raw materials, political instability, turbulent economy, high bank interest rates, lack of government incentives, poor knowledge of international marketing, port problem, poor infrastructure and labor union are some of the internal problems of Bangladesh RMG. This sector is being incrementally faced with the burden of obligations imposed by the developed countries in the guise of compliance issues. There are two types of views about the future of Bangladesh Ready Made Garments (RMG) Industry after MFA era. The optimistic view

3.2 Competitive advantages of the Bolivian apparel sector

The studies of Frazier, Bruss, Johnson, (2004) revealed that the following factors are critically affecting to the Competitive of the Bolivian RMG Industry. Labor Apparel industry is heavily labor intensive and depends on the low salary workforce for assembly lines with acceptable skill level. The Bolivian academics identified that the Bolivian Labor pool has a potential to be improved in order to meet the industrial expectations that could lead to the development of competitive advantage. Further Creating employment opportunities for women would be a highly positive step in the alleviation of poverty in the country.

4 THE GAP BETWEEN THE EMPIRICAL STUDIES AND THIS STUDY.

Chavalit, N and et all (2015) has identified that the four factors are affecting to the Competitive of the RMG industry in Thailand when competing its rivals in the global market. The Leadership, Teamwork, Investment and R & D were identified as the most affecting factors and statistically proved. It was justifiably proved that how these factors are affecting in varying degrees. But due to the inherent characteristics of the employees in Thailand, the efficiency or the productivity of the employees were not taken in to consideration. Further, Thailand being a developed country, the raw materials are in access and due to it’s geographically easily accessible location, Supply Chain Management are quite easy to manage. That leads to reduce or manage the lead time (overall) considerably.

According to Shahidul, K and et all (2014), A lead time is the latency between the initiation and execution of a process. In apparel industry, lead time is the total amount of time required for completing a product beginning from the date of receiving the order to the shipment of the goods to customer. Time is a great issue in apparel trade as orders are based on weather, seasons and occasions. Lead time hence, carries huge importance when delivering the products to the respective outlets is concerned. Therefore the lead time matters a lot in the RMG industry like other other four factors identified by Chavalit, N and et al (2015). Therefore, the lead time factor is being unable to be neglected in maintaining the competitiveness in the RMG not only in Sri Lanka.

In the developing countries, the labor productivity or the efficiency is not up to the same standards maintained in the developed countries. But the Chavalit, N and et al (2015) had not identified the critical importance of the labor productivity which has not been a big issue in Thailand though highly matters in South Asian and other third world country regions. In this paper, the labor productivity or the efficiency has been identified as another very influencing factor to the competitiveness of the RMG Industry in Sri Lanka.

5 CONCLUSION AND FURTHER RESEARCHABLE AREAS

The competitiveness of RMG industry is very subjective and highly volatile with the environmental effects. The identified factors are also inseparably interrelated in order to improve. Some other factors such as employee motivation factors are also playing major role in improving the competitiveness because RMG is highly labor intensive industry. The study of Garment Industry Competitiveness in Sri Lanka found that Sri Lanka is clearly losing the competitive battle to its neighboring competitors, primarily due to the lack of skilled labors and not usage of state of art technology. The governmental authorities have not been in line with the policy and fiscal practices applied in other countries. The government doesn’t apparently take correct initiatives to promote the RMG business in Sri Lanka despite the industrialists used to attempt themselves in individual basis sometimes collectively. This has therefore led to an exodus of larger enterprises to countries where skilled labor is less expensive with updated technology applications while many smaller Sri Lankan garment SMEs have ceased operations. The study however attempts to provide a eye opener into how Sri Lanka’s garment institutions need to embrace research and development thereby raising the international image and competitiveness of its apparel products. Additionally, leadership and workforce teamwork are key components which affect the industry’s future success. Additionally, Sri Lanka’s garment and textile industry is highly labor intensive and larger organizations have a significantly higher contribution factor to the industry’s growth. Therefore, the efficiency matters a lot in enhancing the competitiveness. Further when compared to other competitive countries, Sri Lanka
has very limited logistic structure in which raw materials are in scarcity. Thus lead time causes heavily in order to be productive while all other factors were adequately improved. It was justifiably attempted in this paper to show that the R & D, Investment, Leadership, Teamwork, Efficiency and Lead-time are key factors in maximizing influences and competitiveness of the Garment Industry in Sri Lanka.

Apart from these major factors mentioned-above, Alam (2013) in his paper said that in order to strengthen its competitiveness of the RMG industry, it also might be important for the garment industry to improve various impediments, such as insufficient infrastructure, corruption, labor unrest, and labor productivity, in order to create a future sustainability the industry which applies exactly similar in the Sri Lankan context.

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