

THE COMPETITIVENESS OF CHINESE
AND KOREAN TEXTILE INDUSTRY

中韩纺织业竞争力比较

杜晓燕 著



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前 言

本书是笔者在博士论文研究的基础上写成。笔者在韩国启明大学攻读博士学位,论文以英文完成,因此本书总体框架上分为两大部分:英文部分和中文部分,以英文内容为基础,在翻译成中文后又根据现实情况的变化做了一些修改补充。

本书的主要研究内容是中韩两国纺织业的竞争力对比。纺织业在中韩两国都是经济中的传统支柱产业,两国纺织产业都在世界上占有举足轻重的地位。特别是,韩国纺织业对世界市场流行的影响越来越明显。本研究通过调查两国纺织企业收集数据,运用波特的钻石模型分析两国纺织产业的战略等要素异同,对比两国纺织产业竞争力,并分析了竞争力的来源。本书具体内容分为五大部分:第一章绪论,陈述研究目的和范围;第二章定性分析中韩两国纺织产业的地位和现状;第三章文献综述,说明本研究的理论背景和基础模型;第四章提出研究假设和研究模型,并显示结果;第五章得出结论,并指出贡献与不足。

尽管已经有许多论文集中运用波特钻石模型对比研究两国竞争力,他们不断改进波特的钻石模型,从单个的钻石模型发展到双钻石模型(偌格曼,1991;摩恩等,1998;邓宁,2003);将政府变量由外生变量转换成内生变量,因为对于国家竞争力来说,政府因素是一个主要因素(崔,摩恩和金,2008),他们大多致力于宏观比较,并没有注意到生产者的竞争力决定产业的竞争力。另外的学者深入探讨影响生产者竞争力的主要因素(格兰特,1991;杰西门,2000),但是,他们却忽视了钻石模型的作用。因此,本书将汲取前辈学者的研究成果,将钻石模型引入微观领域——纺织企业的竞争力研究。

本书通过调查中国长江三角洲的纺织企业和韩国大邱纺织企业两个地区,综合分析两国的纺织产业竞争力。之所以选择这两个地区是因为这两个地区都以纺织业闻名于世,都拥有纺织业集群。本书的数据通过对这两个地区问卷调查的方式获得。样本共包括来自两个地区的248个生产厂,调查数据截至日期为2006年底。

本书运用劳动生产力来衡量竞争力,并根据波特钻石模型确定分析因素,不过,对波特的钻石模型做了进一步的调整:将宏观指标微观化,将政府因素由外部偶然因素转换成必然因素,排除了钻石模型中的机会因素,因为很难收集衡量这个因素的数据,调整后的模型变为改进的双钻石模型,简称MDDM。本文将用回归分析方式找到影响竞争力的主要因素,并用T检验方式对比两国的差异;并且根

据纺织业产业链将样本分为上、中、下三类,根据企业规模(生产厂工人数量)将之分为小型,中型 1 和中型 2,运用 ANOVA 和 T 检验对比分析了两国竞争力的差异。

实证研究结果表明企业和产业竞争力来源于企业内部因素无论企业处于产业链的何处,也无论企业的规模大小,更无论在哪个国家。企业的内部因素包括企业资源、战略、组织结构以及组织文化。企业外部因素包括需求市场、相关产业和政府,外部因素仅影响竞争力,但不能决定竞争力,尤其是数据分析表明与韩国相比中国政府支持力度高,但两国的竞争力并没有统计学意义上的差异。主要原因是两国企业内部因素差异很小,另一个原因是两国属于不同的集群分组,中国处于中等大国组,而韩国属于中等中国组,只有两国属于同一组具有相似的特征和产业规模比较才有意义(崔,摩恩,金,2008)。

这个研究结果对于两国的企业家非常有意义。尽管外部环境变化无常,但企业家应该致力于改进内部条件,包括企业内部资源的积累、职工的教育与培训、组织结构调整、加强职工之间的合作以提高组织效率,并且提高劳动生产率。对于政府来说,政府对产业的直接支持并不能提高产业竞争力,而政府应该扮演一个引导者和调解者的角色,保持本民族文化的传承和特征,鼓励研发和技术创新。

本书有三个重要发现:一是 MDDM 模型的发现与运用;二是在两国的对比分析结果中,纺织生产企业的内部因素直接并且明显影响竞争力;三是在企业外部因素中需求市场的激烈竞争对两国来说程度是相同的,对两国的竞争力的影响都是反向的,所以我们应该鼓励竞争但是要避免过度竞争。

未来的相关研究应集中于运用 MDDM 模型研究其他行业,比如汽车行业、服务业和娱乐业等的竞争力分析。对于纺织行业的研究应集中于时间序列分析竞争力的动态变化。

内容简介

纺织业在中韩两国都是经济中的传统支柱产业,两国纺织产业都在世界上占有举足轻重的地位。特别是,韩国纺织业对世界市场流行的影响越来越明显。本论文将通过调查纺织企业收集数据对比两国纺织产业竞争力,本研究运用改进的波特钻石模型对比分析两国纺织产业的竞争力异同,以及竞争力的来源。

实证研究结果表明企业和产业竞争力来源于企业内部因素,无论企业处于产业链的何处,也无论企业的规模大小,更无论在哪个国家。企业的内部因素包括企业资源、战略、组织结构以及组织文化。企业外部因素包括需求市场、相关产业和政府,外部因素仅影响竞争力,但不能决定竞争力,尤其是数据分析表明与韩国相比中国政府支持力度高,但两国的竞争力并没有统计学意义上的差异。主要原因是两国企业内部因素差异很小。

这个研究结果对于两国的企业家非常有意义。尽管外部环境变化无常,但企业家应该致力于改进内部条件,包括企业内部资源的积累、职工的教育与培训、组织结构调整、加强职工之间的合作以提高组织效率,并且提高劳动生产率。对于政府来说,政府对产业的直接支持并不能提高产业竞争力,而政府应该扮演一个引导者和调解者的角色,保持本民族文化的传承和特征,鼓励研发和技术创新。

关键词:纺织产业竞争力,竞争优势,改进的双钻石模型

ABSTRACT

The textile industry is a traditional pillar industry for both Korea's and China's economy. The textile industries in both countries hold the pivotal status in the world. The Korean textile industry especially has the more and more obvious influence on the world market. This thesis will compare the competitiveness in the textile industry between Korea and China, in which we will investigate textile firms from the two countries. The thesis will use Porter's Diamond Model to illuminate the differences of competitive strategy in the textile industry between the two countries, the origin of the differences, and the different influences on the competitiveness.

The empirical results suggest that the competitiveness of both enterprise and industry depend on a firm's internal factors, the firm's internal factors obviously influence productivity in the two countries, and internal resources include the firm's resources and firm strategies, and organizational structure. The external environment of the firm includes demand markets, related supporting industries, and the role of government. The external factors only influence competitiveness, but they can not determine it. Particularly government supporting in China is much higher than that in Korea. Nevertheless, in measurement, the industry competitiveness between the two countries is not statistically significant different, the main reason is that the difference of the firm internal factors is not very big. Another reason is that the two countries are classified into different groups according to the results of the cluster analysis from prior research; Korea is classified into the intermediary – medium group, while China is in the intermediary—large group. A nation's competitiveness is more meaningful when it is assessed among nations with similar characteristics competing in similar industries because competitiveness implies a relative position among competitors in the same competitive group (Cho, Moon & Kim, 2008).

The results of this empirical research are useful to businessman in the two countries. It suggests that the external environment factors of firm's always change, but the important focus is on the enterprises' internal factors, which

include a firm's resources, organizational structure, and its improvement in order to achieve high productivity. Through employment training high productivity of Korean textile firms can be reached. In addition, through the education of employees with regard to computer and internet usage related information can be obtained to positively influence productivity in China. Another internal factor is organizational structures; if the firm takes advantage of cooperation among workers, the firm's organizational efficiency (e. g. information transfer speed) can exceed its competitors, and the firm workers will have a better understanding of the company's management, thereby complying with management policy. Thus, this firm can achieve high productivity. The results suggest that the government gave less support to the exporting of textile industry because it is relatively useless for improvement of competitiveness. Among the industries the government can serve as a guide and coordinator to preserve traditional formats, style and characteristics, and to enhance research and development abilities to develop competitiveness based on the technology.

Key Words: Competitiveness of textile industry, Competitive advantage, Modified Double Diamond Model (MDDM)

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Chapter 1 Introduction

1.1 Purpose of the Study

The textile industry is a traditional pillar industry for China's economy. For many years, it has played an important role in increasing job opportunities, pushing on urbanization, raising the people's living standard and promoting social and economic development. While the textile industry is making great achievements, it is also facing great challenges. The textile industry is the largest manufacturing industry in China. It has about 24,000 enterprises and employs about 8 million workers. In 2002, the value of its total output was 152 billion US dollars. China is the largest clothing producer in the world and has the largest production capacity for textile mill products consisting of cotton, manmade fibers and silk. Since the 1980's, China has developed rapidly in international textile trading and has become a significant export country in this field. The Chinese textile industry plays an important role in earning of foreign money and contributing greatly to the development of the Chinese economy. In 2004, China achieved good trade performance with a total export and import value of Chinese textile and apparel at 111.97 billion US dollars. Also the trade volume contributed to 9.7% of the country's total trade of goods. In 2004, China successfully participated in textile trade, with the total value of import and export surpassing 100 billion US dollars, 1.7 times greater than that in the year 2000. The value of import only increased 20% from that of 2000, which was not a big change (China Chamber of Commerce for Import & Export of Textiles, CCCT, 2005).

Figure 1-1 shows amount of import and export of Chinese textile products from 1990 to 2007.