

DIAGNOSTIC STUDY OF KOTA

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1. Description of the Cluster

1.1.1 Defining the product

Kota Doria is a unique hand-woven fabric having a characteristic square-check pattern. The deft weavers of the cluster create it through differential beating of the silk and cotton yarns. Each square of 14 yarns (8 of cotton and 6 of silk) is termed as a ‘*khat*’, and this is the hallmark of *Kota Doria*. A total of 300 ‘*khat*’s’ are there across the width of the fabric, which is up to 46 inches due to the usage of a throw shuttle technique on pit looms.

While the origin of *Kota Doria* was in the form of a headgear by the royal family of Kota, later on the ‘*Oswal*’ community started using the fabric as a sari. It is said that they use *Kota Doria* for religious ceremonies as they consider the fabric auspicious. However, nowadays dress material for ladies suits is also being made. The *Kota Doria* saris, since ages have carried a buy-back value for its customers due to the use of pure *zari* (gold plated silver yarn) in it. The tradition still continues, though usage of various motifs in silk have also found place in the value addition carried out during the course of weaving. The plain *doria* is put to various value additions such as block printing, batik, embroidery etc. outside the cluster.

1.1.2 Geographical Location

Kota Doria is made in many villages located in Kota, Bundi and Baran districts of Rajasthan. However, the oldest and biggest concentration of weavers is in Kaithun, situated about 15 kms. from Kota (the district headquarter). It is approachable by a metalled road. Other major concentrations of weavers are in Kotsuwan (District Kota), Mangrol (District Baran) and Siswali (District Baran). Kaithun and Kotsuwan have been taken up for the initiation of the trust building process in the cluster.

1.1.3 Preparation of Fabric

The process of weaving is supported by a number of activities like pirn winding, warping, dyeing, sizing, etc.

1.1.3.1. Preparation of Yarn

Cotton as well as silk is obtained from the traders of Kaithun, Kota and other parts of the country in the form of hanks (*'lachhis'*). These require further processing before being put on the loom for weaving. The processes involved are:

- **Pirn Winding**

Pirn winding is the process of transferring the yarns from the hanks into spools of the shuttles used in the weft while weaving. Pirn winding is also done for *zari* thread/ silk thread used for value addition during the weaving process. Pirn winding is achieved by using a small swift consisting of a rotary wheel attached to a harness of conveyor belt giving a similar rotary motion to the spool mounted at the other end. Rotation of the wheel by hands results in the rotation of the spool and thereby the thread is wound on small spindles.

- **Warping**

Warping is done for preparing the yarns to be used in the warp. The warping method used in Kaithun is known as 'peg warping', since wooden pegs are used in the process. These wooden pegs, locally known as *'pinjras'*, are placed along the whole length of the yarn so that a continuously criss-crossed set of two yarns may be obtained for the weaving process. (The criss-crossing later on helps in finding out the broken yarn on the loom during the course of weaving.) These wooden pegs are placed below a thick rope tied to a pair of iron pegs on each end and it is the length of the rope that determines the length of the warp being prepared. Presently this length is 30 yards, keeping in mind that at a time 5 saris of 6 yards each are woven on a loom. Thus, keeping a margin for wastage etc. the warp length is predetermined and yarns are wound around the two iron pegs, dug into the ground fully stretching the rope.

At least two persons are required for the entire process. While one person has to twist the yarns with a help of a heald, which has the yarns passing through it, the

other person has to hold the stand consisting of the spools of the yarns. So one person keeps on holding the stand of yarns, both of them take turns round the pegs to achieve the desired number of yarns in a warp.

Usually the activity is done in the open spaces or by-lanes near the house of the weaver, either by the non-weaving family members or by other hired persons, usually old-aged women of the village.

The number of rounds to be taken between the two ends of the rope is based on the number of "*khats*" desired in the sari. Since each '*khat*' is made of 8 cotton and 6 silk yarns in it, the number of rotations around the stands is determined by the capacity of the heald being used. Hence an original Kota Doria sari of 300 "*khat*'s' has 2400 cotton and 1800 silk yarns in the warp.

- **Dyeing**

Dyeing of the silk and cotton yarn is done by 6 dyers. For certain colours, such as Red, Foam Green etc. mill dyed yarn is also purchased, which is quite rare owing to the high costs of such yarns. Direct dyes owing to their easy use and good retention on silk as well as cotton, are used by the dyers. Dyeing is done of the readied warp as well as the hanks for the weft. The process of dyeing involves the washing of the hanks/warps, then dipping them in a warm bath of dye, fixing of the dye and thereafter further washing and final drying.

The present dyeing rates are Rs. 60 for one '*paan*' (i.e. 30 yards of warp and yarn hanks for the weft for 5 saris). The rate is slightly increased for two colours in the same '*paan*' or for dyeing the yarns in different colours for warp and weft for a "Rangoli" variety of saris.

- **Sizing**

Sizing is mainly done for imparting the yarn enough strength, surface glaze and stiffness so that it can withstand the beating of the reed during the weaving process and also maintain the stiffness necessary for even weaving and a proper look of the

sari once the weaving is complete. This is important since no further ironing/polishing of the sari is done in the cluster.

Sizing is done only for cotton yarn and is generally done by using thin paste of rice (*'maandi'*). Some weavers also use the juice of a special variety of onions. Sizing is done by the labourers available for this purpose in the village. The process involves painstakingly brushing of the yarns stretched along a stand, using the sizing paste and special brushes for this activity. These brushes are made up of a particular type of coniferous leaves brought to Kaithun by the brush-makers from Kashmir, coming to the village every year for preparing/ repairing the brushes.

1.1.3.2 Preparation of Loom

Preparation of the loom for weaving involves the following activities:

- **Drafting:**

The process of passing the warp yarn through the heald of the loom as per the design to be woven is known as drafting. This helps in the further process of weaving when locating a broken yarn becomes easy due to the heald and also helps in the designing processes.

- **Denting:**

The reed, a comb like structure, locally known as *'raanch'*, is filled with the yarns by skilled craftsmen on their own or through the men adept at this skill. The reed is made of a special variety of bamboos found only near Benaras.

- **Piecing:**

Since the process of denting is quite laborious and time-consuming, its usually done either on a new loom or in case if the design is changed. Otherwise, just new yarns are added to the left over yarns in the reed to continue weaving. This process of joining the warp yarns, with the help of the thumb and the index finger, using some ash in the process, is known as piecing.

- **Design setting:**

The setting up of design on the 'jala' of the loom is also a specialized activity and so is that of making of the graphs for the designs. The use of doobby of up to 16 plates and jacquards of up to 100 hooks are also being used in Kaithun, the total number of doobbys being about 25-30 while about 50 odd jacquards are in operation. Dobby is mainly used for ground motifs and in some instances for the pallu also. On the other hand, jacquard is being used for making exquisite borders of the saris. The method of using small spindles, locally known as 'tillis' for making the motif on the ground/pallu/border of the sari makes the designing process quite lengthy but at the same time provides such a fine effect which is not noticed in any other handloom sari easily.

1.1.4 Current Output

The annual production of *Kota Doria* is estimated at 82,000 saris at full capacity, i.e. 1500 looms working 200 days and preparation time of 50 days. Value of the product is estimated at Rs. 20.5 million (@ of Rs 250 per 5.5 meters of fabric = 1 *sari*). This is also based on an assumption that only plain fabric is being prepared. However, people at Kaithun hardly prepare plain fabric. The fabrics prepared by them are dyed and also have ornamentations. Hence, we may assume that the value of fabric will be at least 60% more than that of the plain fabric. This would be so because in case of value added saris the production time gets increased and thus the volumes get reduced considerably. Hence, it can be safely assumed that the value of the total annual production is about Rs. 33 million at present. A typical production cycle of *Kota Doria Sari* of Kaithun appears below.

Typical Production Cycle of Kaithun

The detailed discussions held with the master weavers, weavers & traders have revealed the following:

- I. Pre-loom and post-loom activities are also done by the weavers themselves and these go on side by side along with weaving.
- II. The weavers generally take about 15 days to come out with one '*paan*' (or 5 saris, each of 5.5 mts. each) for a plain Kota Doria sari
- III. The '*raanch*' needs a change in its denting pattern only when there is a change in the type of weaving required or any problem during production. Other wise the '*raanch*' is seldom set afresh.

Thus, a typical production cycle in Kaithun, with full capacity utilization of 1500 looms would emerge as follows:

Day 1-7:	Raanch setting, seizing, warping, Pirn winding etc.
Day 8-23:	Weaving 90%, Other Activities 10%
Day 24:	Loom setting, miscellaneous activities etc.
Day 25-40:	Weaving 90%, Other Activities 10%
Day 41:	Loom setting, miscellaneous activities etc.
Day 42-57:	Weaving 90%, Other Activities 10%
Day 58:	Loom setting, miscellaneous activities etc.
Day 59-74:	Weaving 90%, Other Activities 10%
Day 75-78:	Loom setting, miscellaneous activities etc.
Day 79-94:	Weaving 90%, Other Activities 10%
Day 95:	Loom setting, miscellaneous activities etc.
Day 96-111:	Weaving 90%, Other Activities 10%
Day 112:	Loom setting, miscellaneous activities etc.
Day 113-128:	Weaving 90%, Other Activities 10%
Day 129:	Loom setting, miscellaneous activities etc.

Day 130-145: Weaving 90%, Other Activities 10%
Day 146: Loom setting, miscellaneous activities etc.
Day 147-162: Weaving 90%, Other Activities 10%
Day 163: Loom setting, miscellaneous activities etc.
Day 164-179: Weaving 90%, Other Activities 10%
Day 180: Loom setting, miscellaneous activities etc.

Hence, in 6 months (180 days): Weaving: 144 days and other activities: 36 days

Therefore, in 1 year, Weaving = 292 days, Other Activities = 73 days

For 250 person days, Weaving = 200 days, Other Activities = 50 days

Production Capacity

As per the survey of D.C. (Handlooms), 1442 (say 1500) looms were counted in Kaithun.

Since 15 days are taken for 27.5 metres, per day production = 1.5 metres

Hence total annual production = $1500 \times 1.5 \times 200 = 450000$ metres of Plain Doria Fabric, which is equivalent to 82,000 saris. Thus annual value of output of Kaithun is estimated at $\text{Rs } 250 \times 82000 = \text{Rs. } 20.5$ million.

The value of production would increase when dyed and designed fabric would be taken into consideration. However, the production time would also be increased commensurately. Hence, it may be safely assumed that the overall production value would be increased only by 60% and would go up to Rs. 33 million.

1.2 Core Cluster Actors

The Core Cluster actors can be divided into two broad categories:

1.2.1 Weavers

Kaithun has about 1500 weavers and about 1500 looms, while Kotsuwan has about 55 weavers, with the same number of looms. These weavers have their families and the looms living in cramped houses, most of which are “*kuchha*”. A typical weaver family would consist of a couple engaged in the weaving activity and the old aged members helping in the other related activities such as warping, winding etc. or in case of a larger family, some are working as employees for other weavers and others taking turn in weaving on the loom. Hence, weaving in the cluster is a household activity supported sometimes by other non-weaving persons from the vicinity. Generally a weaver is conversant with all the activities related to weaving but uses the services of other persons also, especially in laborious tasks such as warping, winding, piecing, denting etc. The weaver is basically a job worker. He takes raw material from the master weavers and gives them the finished product. The wages for 1 ‘*paan*’ (5 saris) are fixed on the following basis:

- Basic wage for weaving: Rs. 500
- Cotton warping: Rs. 15
- Cotton pirn winding: Rs. 25
- Sizing: Rs. 100
- Silk Warping: Rs. 25
- Weft bobbin filling: Rs. 40
- Additional wage for motifs by *zari thread by jala*: Rs. 0.07 per khat
- Additional wage for motifs by *PMC thread by jala*: Rs. 0.12 per khat
- Additional wage for ‘bel’ by *jala*: Rs. 0.10 per khat
- Additional wage for ‘Jamavar’ motifs: Rs. 3 per khat
- Additional wage for large border motifs: Rs.0.50 per khat
- Additional wage for jacquard: Rs. 250 per sari
- Additional wage for dobby: Rs. 100 per sari

1.2.2 Master Weavers

Master Weavers are those weavers who, by virtue of their enterprise or available resources, not only weave themselves but also support other weavers by providing them with the raw material and buying back the finished saris. Hence 47 master weavers exist in Kaithun who not only procure saris from the weavers of Kaithun but also from Kotsuwan and other weaving villages. They have developed contacts with the traders of Kota and other cities and sell off the saris through these outlets. Usually the master weavers are joint families where while one of the brothers looks after production, the others manage selling issues. The master weavers also give the design brief to the weaver including the desired colour, the graph of the design and other necessary instructions.

Some of the master weavers have grown so enormously that they together provide support to almost half of the looms of Kaithun. These master weavers also buy raw material at wholesale rates from the mills/ producing centres and provide the same to the smaller master weavers and the weavers attached to them. Some master weavers families have also been able to develop marketing linkages with an up-market boutique owner of New Delhi. The boutique owner provides designs and colours and buys the finished product after a thorough quality check.

Some of the smaller master weavers are also resorting to direct sales in various cities by door-to-door selling and similar small-scale direct sales efforts.

1.3 Other Cluster Actors

There are a number of other persons who contribute to the activities of the cluster and thus play an important role. They can be classified as follows:

1.3.1. Raw material suppliers

Kaithun has 12 raw material suppliers who procure cotton, silk and zari from the wholesalers/ production centres and stock the same to supply to the master weavers/weavers. The weavers of Kotsuwan procure the raw material from Kaithun/ Kota.

1.3.2. Raanch Maker

There is one *raanch* maker in Kota who makes the reed (*'raanch'*) from the special '*Baru*' wood procured from Benaras, Uttar Pradesh.

1.3.3. Raanch Fillers

There are about 10-15 '*raanch*' fillers, who move from one household to the other to either fill the reed with the warp yarns or to join the new warp yarns to the reed; i.e. these workers provide the services for denting and piecing.

1.3.4. Graph Designers

There are three designers in Kaithun who are adept at transferring designs on graphs for setting up the '*jala*' (design-making thread arrangements) on the loom. They also serve the Kotsuwan village.

1.3.5. Dyers

There are 6 dyers in Kaithun who take care of all the dyeing requirements of the town. Kotsuwan does not have any dyer in the village. The dyers dye the warp as well as the weft yarns not only in their houses but also go to the weavers' homes if the dyeing is to be done on a warp stretched on the loom. This happens when in a sari, the yarn of any particular colour gets consumed earlier than expected.

1.3.6. Loom Mechanics:

There are about 10-15 loom mechanics in Kaithun who can not only make a new loom but also do the processes of drafting, repairing the loom, setting up the '*jala*' on the loom for designs and other related activities.

1.3.7. Support Service Providers:

The support service providers can be either from within the household of a weaver or from outside. The activities performed by these persons are warping, pirn winding of weft yarn, zari/silk yarn for designs, sizing etc. Usually the persons who do not own a loom or are not good at weaving are engaged for performing these activities.

1.3.8. Traders of Kota

The traders dealing in Kota Doria saris have their shops in *Bhairu Gali* (a small lane of around 75 meters length and 3 meters wide) of Kota and there are about 50 such traders. Though most traders source saris from the master weavers of Kaithun, about five of them also source directly from the weavers of Kaithun or other weavers' villages. The traders used to give their own designs earlier but of late they have started buying the ready lot from the master weavers. The traders sell not only Kota Doria saris but also other saris bought from Surat, Benaras, Mhow etc. including the power loom substitute of hand-woven Kota Doria. For these traders, Kota Doria forms just a small fraction of their total merchandise (about 5% only as per a market survey conducted in *Bhairu Gali*). These traders have business contacts in other cities with similar wholesalers and they sell the Kota Doria saris through these channels too. But majority of their sale is local and that too of the power loom made duplicate Kota Doria.

1.3.9. Boutique Owner

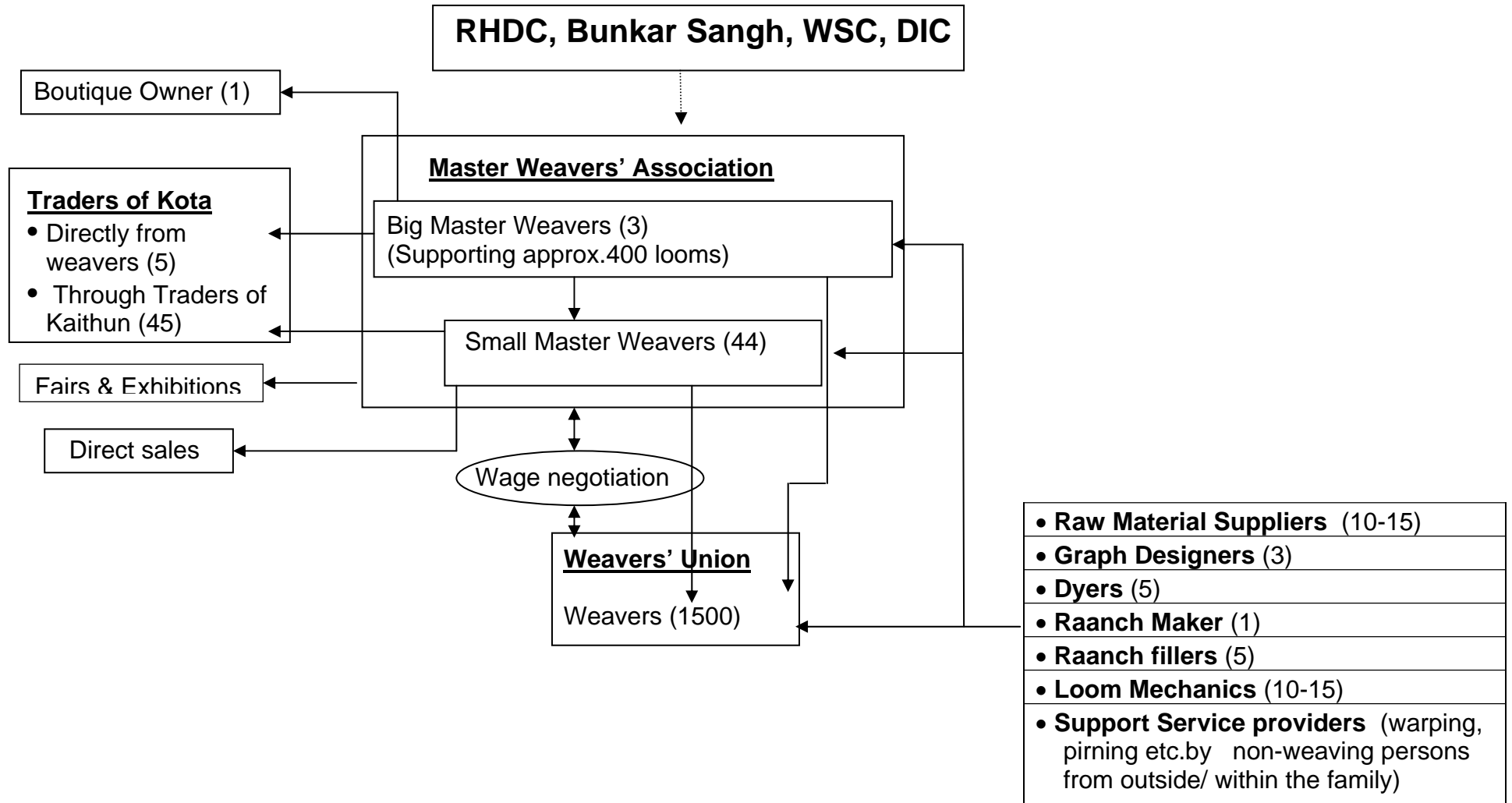
There is one boutique owner from New Delhi, who procures Kota Doria saris from three master weavers of Kaithun. These master weavers dedicate some part of their production capacity to meet out the production requirements of the boutique owner. She has been working since 10 years in Kota and has diversified into furnishings including curtains, pillow cover, cushion cover, bedspreads, ladies garments including casuals, salwar suits, dupattas, skirts and accessories like ladies hand bags, decorative items, etc apart from saris. She has organized fashion shows to popularize 'Kota Doria'. She has been able to infuse new designs and colour ranges in Kota Doria and also the use of zari as a regular weft yarn to bring in a sheer effect, the new product being known as 'Tissue Kota Doria'. This has been in the direction of making

Kota Doria a fabric not only for summers but also for other seasons. However, she faces quality related problems such as poor dyeing and colour matching, shrinkage etc. Basically this boutique owner caters the up-market niche clientele.

However, the other facet is that none of the innovative ideas of the boutique owner have actually been passed on to the master weavers/weavers of the cluster and they still regard their product as only sari. Hence, the percolation of the benefits accruing out of such value addition, which seems to mainly occur at the boutique owner's premises, have not passed down to bring in any noticeable change in their skill, income or volume of the overall production, which should have happened looking to the immense potential of a diversified product range.

The current cluster map of Kaithun appears below.

Current Cluster Map of Kaithun



1.4 Current Institutional Linkage

The cluster has hardly any active support/ service institutions to guide it in the right direction. A few government agencies provide activity-oriented support to the cluster. The local representative bodies namely the Weavers Union and the Master Weavers' Association do not have any developmental agenda and serve the purpose of wage negotiation and resolving of any major crisis, such as the issue of quality of zari to be used in the saris. The following institutions supported the cluster in the past but presently out of these only Weavers Service Centre (WSC) is continuing its support to the cluster.

Institutions linked with the cluster:

- Rajasthan Handloom Development Corporation (RHDC)
- Rajasthan Rajya Bunkar Sahkari Sangh
- Weavers Service Centre (WSC)- Dev. Commissioner (Handlooms)
- Banks
- District Industries Centre

Rajasthan Handloom Development Corporation (RHDC)

RHDC is a Government of Rajasthan agency, formed for the development of the unorganized handloom sector. It has been trying to help the weavers by giving trainings, providing looms, facilitating credit on easy terms and other welfare activities, besides direct marketing support. RHDC, thus, had its supply-cum-procurement centres at almost all important handloom weavers' concentrations, which however, are now closed. The enormous size and lack of commensurate efficiency in management has led to the curtailing of the activities of the agency.

The following activities were carried out by RHDC in Kota Doria Cluster:

- RHDC Centre, Kaithun has carried out trainings under the Project Package Scheme in the years 1997 and 1998, with four trainings every year and 25 participants per programme.

- In 1996 & 1997, under the TRYSEM scheme, 15 and 22 participants were respectively provided the training and financial support.
- Two trainings of 25 persons each were carried out last year for the development of “bootis” (motifs) by using the ‘jala’ work on the traditional looms.
- 40 frame-looms have been provided by RHDC to the weavers in Mangrol.

RHDC has facilitated the implementation of various schemes for the weavers through the DICs, which includes:

- Training and development- through the use of modern looms (frame as opposed to the use of pit looms)
- Welfare Schemes (*Hathkargha Anudaan Yojana*). This is a comprehensive scheme aimed at providing for work shed, finance for WC/ yarn purchase, health facilities (eye-strain, lung strain and asthma treatment).

Rajasthan Raja Sahkari Bunkar Vikas Sangh

This organisation came into existence with similar mandate as that of the RHDC, but has a different approach towards the development of the handloom sector. As the name is itself an indication, it has tried to develop the handloom sector by formation of primary weavers’ co-operative societies and their representation in the working committee of the agency. The idea was a well conceived one, but it has failed miserably. The societies have supported the local traders and influential people and a lot of political rivalry exists between the various warring factions within the agency. All this has seriously affected the efficacy of the agency’s interventions. The present turnover of the agency is estimated to be more than 50 lakhs per annum. However, a very minuscule amount of this sum comes through the Kota Doria societies.

Bunkar Sangh facilitates the provision of the government benefits to the weavers through various schemes such as a Project Package Scheme, which are yet again dovetailed through the DICs. Apart from this, it also helps in providing raw material to the weavers.

The total number of societies being supported by Bunkar Sangh, as revealed by their office, presently is as follows:

- Baran - 4 (1 functional)
- Bundi - 4 (non functional)
- Kota – 16 (7 functional in Kaithun, rest 9 non-functional)

Market facilitation by Bunkar Sangh

The sale of saris is being conducted through the showrooms and sales outlets of Bunkar Sangh. It has 22 showrooms all over India (20 in Rajasthan, 1 in Navi Mumbai, 1 in New Delhi). The sales outlet in Delhi is a franchisee outlet.

The product break up of Bunkar Sangh for Kota Doria can be estimated as 95% ordinary saris and 5% fancy saris. It usually has the season time during April to July, while the rest of the year is off-season. The rates of ordinary saris ranges from Rs. 250 to Rs.500, while the decorative saris range between Rs. 600 – Rs. 1000.

Weavers' Service Centre, Development Commissioner (Handlooms)

Weavers' Service Centre (WSC) set up by Development Commissioner (Handlooms), Government of India is one of those few government agencies in the state which have carried out the implementation of the schemes at the grass root level effectively.

The WSC has adequate facilities to provide guidance in weaving, development of new designs on the looms using jacquard and dobby, improvement in the weaving patterns, dyeing, use of new azo-free dyes and other R&D related issues.

The centre has a full-fledged laboratory in Jaipur and it has carried out the following programmes within the past five years for the weavers of Kota Doria:

- * Three design & dyeing workshops: Azo-free dyeing of cotton as well as silk, new designs using dobby and jacquard were taught to 150 weavers in each workshop.
- * A 3-month training programme for weaving: 50 weavers were taught '*zamdaani*' weaving so that borders of the Kota Doria saris could be embellished.

* Another 1-month training for 'zamdaani' weaving for made ups and furnishings.
This was done under the project received from HEPC, wherein 50 weavers of 4 societies were trained to weave on a weft size of 60" and 72" on frame looms. Eight frame looms have been distributed by the centre along with the latest gadgets such as a complete steel reed, double shuttle etc.

Banks

The Central bank of India, the lead bank for Kota and Baran district, has its branch in Kaithun as well as in Mangrol, Siswali, Digod etc. As per the information available from these banks, the weavers have availed loans from the banks previously, directly as well as under various government schemes floated by DICs. However, the default rate of these loan takers is substantially high, and almost all of them are willful defaulters. With the result, now the banks hesitate in providing further loans to these weavers. However, the master weavers have a lot of dealing with the banks and they do not find any problems with these banks. Recently, the bank had tried to mobilize a group of women weavers and provided them credit facilities but the group could not function smoothly and collapsed, since their prime intention was to avail the subsidy. Presently, whatever loans under PMRY or SGSY schemes are being sanctioned, are for activities other than Kota Doria weaving.

The rural cooperative bank operational in Kaithun is exclusively providing loans to farmers and thus of little relevance for the handloom weavers.

District Industries Centre (DIC)

The District Industries Centres of Kota and Baran have been closely associated with the cluster. They have disbursed the loans of various schemes of DC (Handlooms), etc. They have also carried out detailed surveys for the same in 1994 and have been helping the artisans by providing them stalls in the DIC fairs, Kota Dushhera Fair, etc.

However, there are several institutions, which can be of great significance for the future development of the cluster. These are:

Institutions that can be linked with the cluster:

- Development Commissioner (Handlooms)
- Textiles Committee
- Handloom Export Promotion Council
- Rural Non Farm Development Agency (RUDA)
- Cotton Textile Research Associations
- Development Commissioner (SISI)
- Cotton Textiles Export Promotion Council (TEXPROCIL)
- Design Institutes
- Rajasthan Small Industries Corporation (RSIC)
- Other Financial Institutions, viz. SIDBI, NABARD

Development Commissioner (Handlooms)

An apex institution set up by the Central Govt., the DC (Handlooms) looks after the promotion of weavers, and works for the upliftment of their socio-economic status and aims at integrated programming for the development and promotion of handlooms. The various schemes being run under its aegis address both the micro and macro level issues. Its support roles includes the facilitation of a wide gamut of activities, ranging from providing basic inputs like looms and accessories, product/design development, infrastructure support (establishment of CFCs), institutional support, training of weavers, supply of equipments, financial support (margin money schemes) and marketing support to the handloom organisations etc. Besides this, assistance can also be sought for marketing research and publicity.

The DC office has recently launched a very comprehensive scheme- the 'Deendayal Hathkargha Protsahan Yojana' that aims to help the artisans develop their businesses on the line of the cluster approach. It would be most appropriate to link the cluster to this scheme in an effective manner. Since the Weavers Service Centre (WSC) is already quite active in the cluster, its mandate may be made more focussed to provide better benefits to the weavers and combine its technical support with other requisite activities such as organising, market support etc.

Textiles Committee

The Textiles Committee was set up in 1963 by the Ministry of Textiles (Gol) with the basic objective ensuring quality in textiles and fabrics. The main functions of the Committee are:

1. Carry out R & D, and testing of the dyes, chemical and effluents etc. through its laboratories
2. Facilitating procurement of Textile Machinery
3. Market Research to assess the domestic market
4. Quality appraisal and assistance to exporters via TQM, ISO certification etc.
5. Vigilance (through Economic research and Market Intelligence Units).

The Committee has also contributed to promotion and publicity of eco-friendly textiles, via consumer awareness. It is a member of many international associations, such as American Association of Textile Chemists and Colourists USA, American Society for Testing and Materials USA, Textile Institute International UK, National centre for Quality Management (India), Indian Fibre Society (India) and ISO, Switzerland.

The Textiles Committee has about 16 laboratories all over India for the testing of textiles dyes and effluents. The Jaipur laboratory has facilities for eco testing also. These laboratories have been authorized by Gol to undertake testing and provide certified results.

The testing facilities are done under three categories:

1. Physical parameters- for cotton, wool, man-made fibres, yarn and fabric
2. Chemical parameters- for fibres, yarn, fabric and dyes & chemicals
3. Eco parameters- for fibres, yarn, fabric, dyes & chemicals, and effluents, etc.

The tests conform to the norms and standards such as: Bureau of Indian standards (BIS), ASTM (USA), AATCC (USA), International Organisation for standardisation (ISO), British standards, British Standards for European Nations, International Wool Secretariat, Japanese Industrial Standards etc. As a statutory body, the committee can vouch for results in the court of law also. The laboratories also participate in

proficiency testing at international levels, conducted by Asia Pacific Laboratory Accreditation Co-operation (Aus.), and Institute of Inter-laboratories (Netherlands).

Close liaison with Export Promotion Councils, Research organisations and export associations make it a powerful media for Fabric Certification etc. Hence, it is important that the office of Textiles Committee located in Jaipur be linked with the cluster.

Handloom Export Promotion Council

The Handloom Export Promotion Council was set up in the year 1965 to promote exports of all cotton handloom items. The Council has its head office at Chennai, with regional offices at Delhi and Mumbai.

The Council, which started with a membership of 96 in 1965, has currently a membership of nearly 2000.

The activities of the Council are as follows:

- Dissemination of trade information and intelligence
- Publicity abroad for Indian handloom products
- Facilitating product diversification to meet modern market requirements
- Providing impetus to modernization of handlooms for the export market
- Provision of design inputs to promote exports of handloom products
- Organizing business missions, Buyer-seller meets and participation in trade fairs abroad
- Consultancy and guidance services for handloom exporters
- Liaison with Government of India on all procedural and policy matters relevant to the handloom export trade
- Dealing with trade complaints pertaining to handloom exports
- Liaison with import promotion and commercial agencies abroad for the benefit of handloom exporters

The Handloom Export Promotion Council does not restrict itself to only disseminating information and assisting in promotional activities but also extends qualitative services to the handloom sector by effecting technological improvements.

To create awareness among the exporters and the weavers, Council in the past conducted Seminars on ISO 9000 and usage of Azo-free dyes and modern dyeing practices in various handloom export production centres. It can thus be an important source of technical guidance as well as export channels for the cluster.

Cotton Textiles Export Promotion Council (TEXPROCIL)

Cotton textiles have been the best offers from India to the world since historical times. Realizing this, the Government of India sponsored the setting up of the Cotton Textiles Export Promotion Council (TEXPROCIL). It has the mandate of promoting and developing the trade and facilitates interaction between foreign buyers and Indian suppliers. Specifically, TEXPROCIL helps prospective buyers locate supplies to their specifications and acts as a catalyst between the supplier and the buyer. TEXPROCIL also ensures commercial discipline and provides conciliation and arbitration in case of disputes. It is another agency that can help in developing the market channels for the cluster.

Development Commissioner, Small Industries Service Institute (SISI)

The office of SISI at Jaipur can be of help for the Kota Doria weavers. The prime objective of the organization is to:

- ❖ Promote the SSI entrepreneurs at the local level
- ❖ Provide avenues for technological up-gradation
- ❖ Provide greater avenues for self-employment
- ❖ Provide technical inputs and trainings wherever required

The organization can provide support by recommending a development project for funding to SIDBI.

Small Industries Development Bank of India (SIDBI)

SIDBI has its office in Jaipur and can be of immense use for garnering any funds for the development of these printers. The schemes of SIDBI are well known and need

no elaboration here. Still mention can be made of the following schemes, which may be of use for the weavers of Kota Doria:

1. Composite Loan Scheme for Cottage, Village & Tiny Industries – A loan of up to Rs. 5 lakhs can be obtained for working capital requirements, making working sheds, etc.
2. Refinance Scheme for Technology Development & Modernisation (RTDM) – A project outlay of up to Rs. 100 lakhs can be sanctioned through commercial banks to meet out working capital expenses, acquisition of technical know-how and design and product development including fashion forecasts, upgradation of the manufacturing technology, packaging and any other related requirements.

National Bank for Agriculture & Rural Development (NABARD)

NABARD has its district development office located in Kota and from this office it has been supporting mainly the agricultural development projects, taking a SHG route for various income generation activities, directly as well as with the help of representative bodies, NGOs and other similar institutions. The NABARD DDM has assured support for the cluster.

Rural Non-Farm Development Agency (RUDA)

Rural Non-farm Development Agency, set up in 1995, works as a support organisation for development of the non-farm sector in Rajasthan. It aims to develop the non-farm sector in the state to provide employment to the rural populace at their place of habitation. Thus, it aims to, not only ease off the pressure on agriculture, but also in restricting the rural-urban migration (in search of employment).

RUDA networks with other appropriate agencies to provide inputs like technology, marketing, design and product development etc. It has developed a strong network with some of the best technical institutes, design institutes, and international development organization of high repute.

RUDA's firm belief in a cluster based, integrated and market driven approach for interventions based on the felt needs of the producers make it a very suitable agency for such development projects, where the thrust on marketing and real grass root level implementation is needed. Among others, RUDA's package of interventions includes:

- Capacity audit of artisan clusters
- Identifying ruling constraints
- Organising artisans
- Providing skill training / upgradation
- Technology dissemination
- Product development and design support
- Credit facilitation
- Market / export linkage support

The success of RUDA's marketing events is quite well known and so are its linkages with Alternative Trade Organizations (ATOs), big exporters, exporting NGOs, etc.

Design Institutes

Design Institutes are very important for solving the design related problems of the cluster; provide new designs to the weavers continuously so that the product line evolving does not loose its craze amongst the consumers. The success of Ms. Vidhi Singhanian lies in the fact that she has been able to bridge the gap between the demands of the consumers and the offerings being made by the artisans. However, this has brought benefits for her and not for the artisans. Hence, the various design institutes such as NIFT, NID and other local (such as IICD) as well as national and international design institutes/ designers need to be mobilized towards this wonderful fabric.

Rajasthan Small Industries Corporation (RSIC)

RSIC has the mandate of providing support to the small entrepreneurs, especially of handicraft sector, in marketing, technical support and other requirements. The major thrust of the organization has been to provide direct marketing support to the crafts persons through its outlets located within as well as outside the State. The corporation has been sourcing Kota Doria saris for sale but while initially it used to

be directly from the cluster and other government agencies, now it has stopped doing so owing to their financial problems. In any case, the marketing outlets of the corporation can serve as a good retail outlet for the artisans.

Cotton Textile Research Associations

The important research associations of the country are Ahmedabad Textile Industry's Research Association (ATIRA), Bombay Textile Research Association (BTRA), South India Textile Research Association (SITRA) and Northern India Textile Research Association (NITRA). The main objective of these institutions is to carry out research and render consultancy services to industry on various aspects of textile technology. The overall aim of such endeavours is to reduce costs and improve the quality and durability of fabrics. Other relevant issues such as reducing pollution, conserving energy and utilising waste, adopting new technology and improving the technology in the decentralised handloom sector are also within the gamut of the activities of these associations.

These Research Associations have carried out original and innovative work in several fields of Textiles. In addition to result oriented, short-term projects in the field of management in the textile Industry, the Research Associations are also currently engaged in other specific projects such as:

- Design development for modern twin jigger system, for enhanced flexibility, quality, economy and ecology in batching, dyeing, etc.
- Development of indigenous online instrumentation for checking effluents parameters, objective measurement of structural parameters of unconventional yarns and their relationship with yarn properties
- Skill upgradation of operators for better performance of spinning mills
- Design development of indigenous low cost rotor for rotor spinning machine
- Study on work culture in relation to high and low productivity in textile mills
- Studies on techno-economics of air-jet spinning technology
- Development of two for one twisting spindles suitable for silk throwing etc.

Besides, useful R&D work is also being done on jute diversified products with Government of India - UNDP Funds.

Other Local Institutions, NGOs, etc.

There is just one NGO, “Hadauti Shilp Sansthan”, which is reported to have done some work for the Kota Doria cluster. However, its impact or activities were not observable in the cluster. There seem to be no other suitable local NGOs or similar institutions who can take up the task of organizing the artisans, carrying out interventions and liaison with the various government agencies to garner funds for development of the weavers and thereby the craft at large.

Similarly there are a couple of polytechnics that can be involved in the activities of the cluster and the fresh students from these institutions can be motivated for development of the cluster.

As such, during the course of interventions, the following institutions are being targeted for their involvement in the development of the cluster during the project period and their support role even when UNIDO plans its exit from the cluster:

- DC (Handicrafts): For registration of the associations, master weavers and weavers for marketing events and for availing the benefits of housing –cum-work shed loan scheme
- DC (Handlooms): For registration of the associations, master weavers and weavers, For participation in marketing events such as the National Handloom Expo, For benefits of ‘Deen Dayal Hathkargha Yojana’, For dyeing workshops & other technological interventions through WSC:
- NIFT & NID: For design & product development programmes, branding issues
- RUDA: For marketing tie-ups
- NITRA: For R&D activities
- SIDBI & NABARD: For marketing assistance and other credit requirements
- NID, CUTS, NRDC etc: For patenting and other brand building activities
- Textiles Committee: For testing, calibration and other technological interventions
- INTACH for marketing and brand promotion, link up with heritage movements etc.
- IRFT, CoTex: For marketing, market surveys etc.

Transaction Cost Analysis Matrix

Agency	Training	Technology (R&D, testing, etc.)	Design & Product Development	Market facilitation	Credit facilitation
DC (Handlooms)	-	-	Medium	Medium	Medium
NSIC	-	-	-	-	Medium
DC (SISI)	-	-	-	-	Medium
RHDC	Low	-	-	Medium	-
Bunkar Sangh	Low	-	-	Medium	-
Weavers' Service Centre	Low	Medium	Low	Medium	-
Textiles Committee	-	Low	-	-	-
DIC	-	-	-	Medium	Medium
Indian Institute of Craft & Design	Medium	-	Low	-	-
RSIC	-	-	-	Medium	-
RUDA	Medium	Medium	Low	Low	-
SIDBI	-	-	-	-	Medium
Cotton Research Associations	High	Medium	High	-	-
Banks	-	-	-	-	Low

(-) Indicates that the analysis is not applicable

2. Value Chain Analysis

The value chain analysis of three variants of the Kota Doria available at present has been done to understand the difference the three types of variants have in the process of production and thereafter marketing. These variants are:

- Plain Kota Doria sari
- Dyed Kota Doria sari with 7 tola (70 gms.) *zari*
- Designer Kota Doria sari

An analysis of the three value chains would provide the following observations:

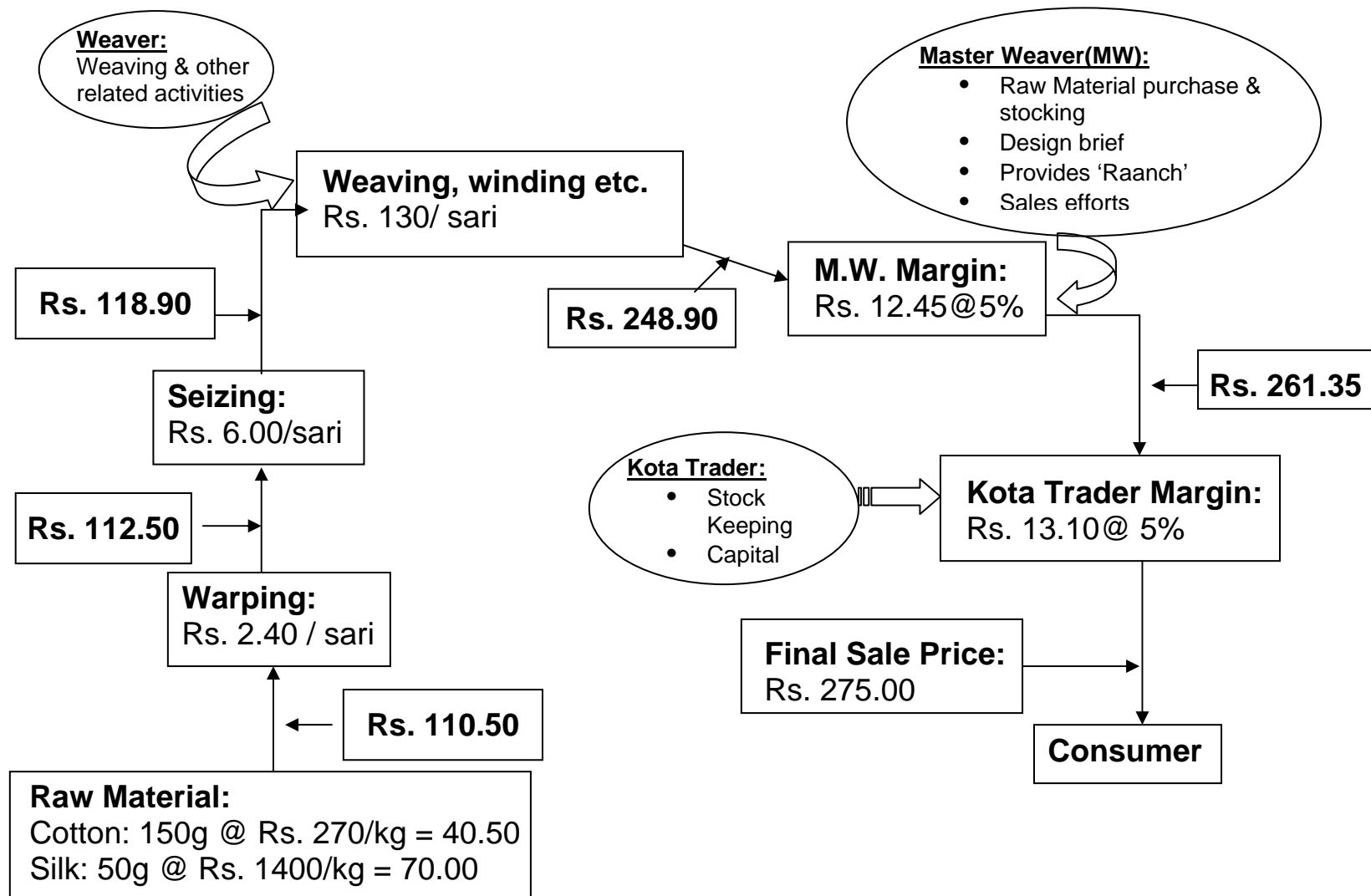
- Raw material accounts for 40% in plain sari, 72% in dyed zari sari and 21% in designer sari
- Value addition is mainly at the weaving stage (47% in plain sari, 12.75% in dyed zari sari and 19% in designer sari)
- Dyeing provides 0.75 to 1.2% value to the final value of sari

This brings out vividly that:

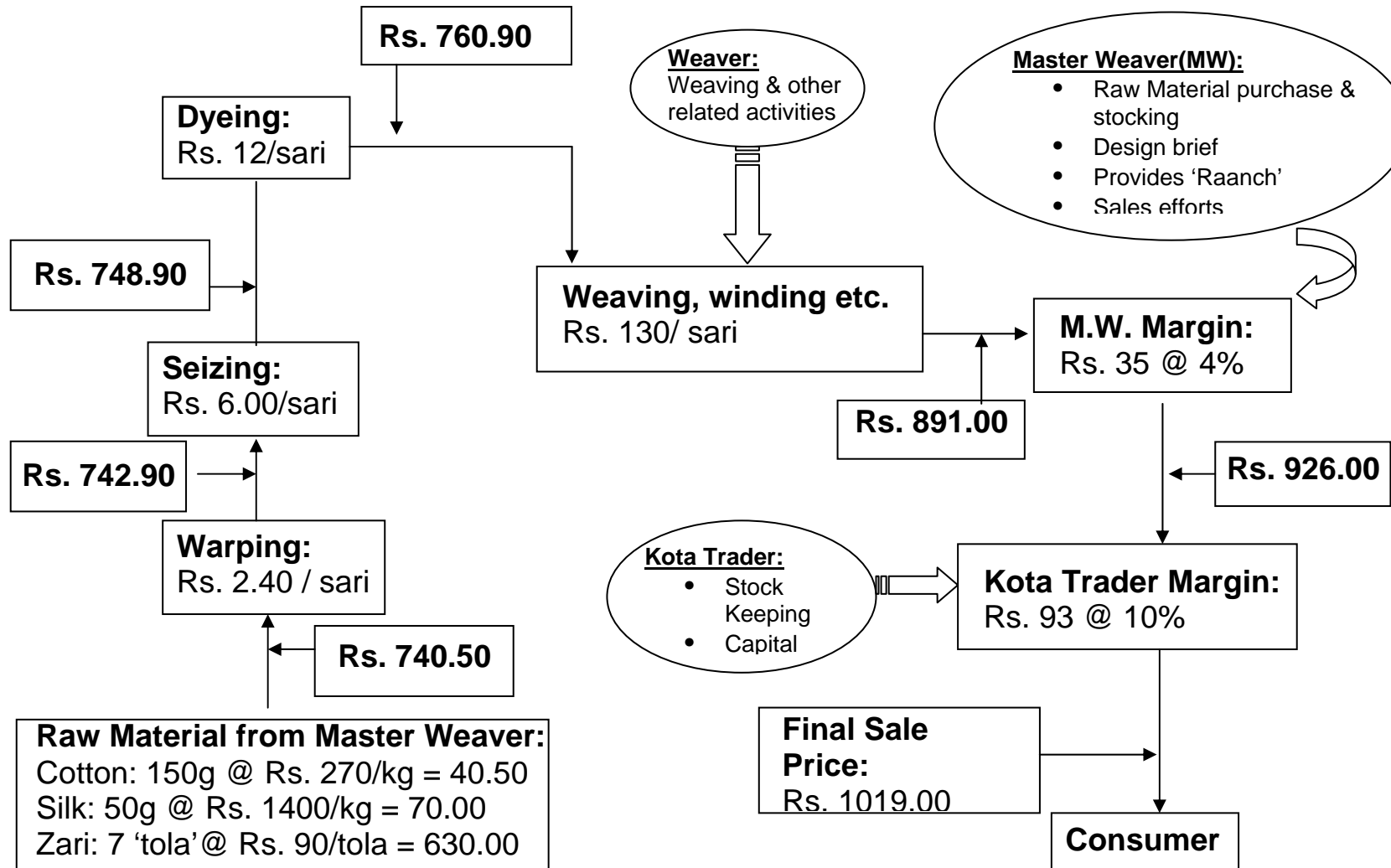
- Addition of zari in a sari unnecessarily increases the component of raw material vis-à-vis the labour component, thus making the sari expensive and yet not passing the benefit to the weaver
- Dyeing is one of the most important constituents in value added saris and yet accounts for very little value, thus underlining the fact that this is a neglected area at present
- Even though the wages received by the weaver for the designer sari seem to be quite high, the actual wages are lower since the time taken to weave such a sari is much higher than the ordinary plain sari.

This underlines the necessity of increasing the productivity and reduction in the time of the drudgery involved in activities such as warping. Scope for higher value addition exists in high value products targeted at niche clientele. The technological investment is weak for all types of fabrics.

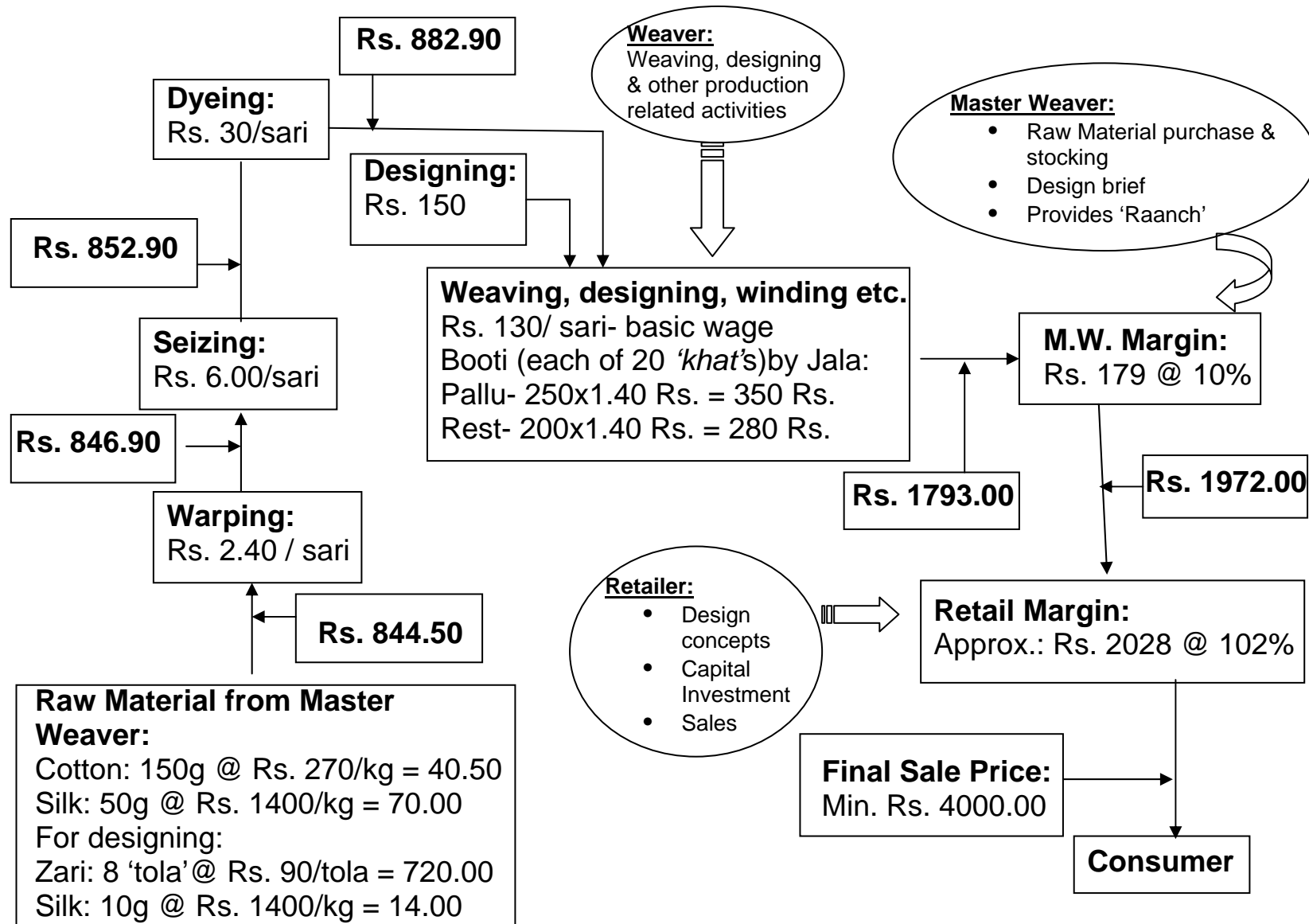
Value Chain Analysis for Plain Kota Doria Sari



Value Chain Analysis for Dyed Zari Kota Doria Sari



Value Chain Analysis for High Value Designer Kota Sari



3. Problems Identified

The problems currently being faced by the cluster are as follows:

3.1 Unorganised nature

Over the number of meetings that have been held with the various master weaver and the weavers, they have expressed the feeling that they are not organized properly in one way or the other. They are aware of the problems but are unable to find any solutions for them. The two associations that presently exist, do not have any action plan for them, take issues on an ad-hoc basis and mainly use this forum for wage negotiation.

3.2 Technological Issues: The various technological issues for the cluster are as follows:

3.2.1 Weaving problems

The looms are quite old and have obsolete technology, thus limiting the productivity of the weavers to a great degree. Moreover, the use of a throw shuttle technique for weaving further decreases the productivity. The process of designing using the '*jala*' on the loom is quite slow, cumbersome and can be used for only small motifs. Though some weavers use dobby and jacquard in the cluster, their use is quite limited. Further, even these dobbys and jacquards have certain limitations with regards to the intricacy and size of the motifs that can be woven by their help. The design of the loom also limits the width and continuous length of the fabric. Moreover, all the processes related to loom preparation such as drafting, denting etc. are extremely time consuming and laborious.

3.2.2 Dyeing Problems

The problem of colour bleeding and improper matching has been raised by all. The use of Azo-dyes and improper matching of the colours in dyeing the yarns not only

limits the export potential of Kota Doria it poses a basic problem in mainstreaming the fabric and increasing its sales volumes in any segment of discerning consumers. The warped yarns as well as the weft hanks are dyed and colour matching is limited to only one batch of raw material dyed at a time.

3.2.3 Warping related problems

Peg warping is not only time consuming but it also poses a problem during the rainy season when out-door warping becomes impossible. Moreover, the peg warping is always for 5 saris at a time and thus limits the chances of quick change in the product line once the warp is done. Furthermore, the process involves a large amount of human drudgery and wastage of time. Sizing and other processes also need to be made quicker and less labour intensive to increase the overall productivity.

3.3 Design & Product Development related issues

The traders give the graphs of the designs to the weavers and they use the same to make the sari. The traders themselves take the designs from their old work, the motifs that they have with them, and new designs seen from here and there. However a systematic cataloguing of designs, evolving new permutations and combinations in line with the market demand is altogether absent. The fabric is mainly used for saris and dress material to some extent. Apart from this, there is hardly any product diversification in the cluster. Similarly, the master weavers do not know following of colour trends, design forecasts etc.

Since Kota Doria was originally not a sari fabric hence all the designs and motifs have been derived from elsewhere. Furthermore, the old graphs etc. have also not been saved by the graph designers, thus losing all the traditional motifs that were made during the old days. Thus, there is hardly any distinctive appeal in the motifs of the Kota Doria saris being made at present.

3.4 Marketing Issues

All the cluster actors interviewed felt lack of aggressive marketing. This is the first issue raised by any one when asked about the problems of the cluster. The weavers/master weavers raised the following issues:

- Building up of the image of **Original Handmade Kota Doria** and promotion of this brand everywhere so as to educate the consumer about the real Kota Doria and thus carve out a separate niche from the power loom fakes.
- Market information about consumers' demands
- Facilitation in participation in fairs, exhibitions, retail meets etc.
- Linkages with boutiques, exporters and other high-end marketing channels

4. Reality Tree

Some of the issues, which were either raised or observed, are as follows:

4.1 Issues raised

(i) Absence/poor linkage with technical/ design institutions:

This was realized by some master weavers who narrated the earlier existence of a design-training centre in Kaithun but which was later closed due to the disputes between the officials and some of the weavers. Hence, a continuous upgradation of their knowledge about technology or design is not there and no agency is there to help them understand the necessity of better design and technology. This has resulted in a lack of awareness and exposure and thereby closed mind-sets of the weaving community in general.

(ii) Dyeing problems:

Weavers, master weavers and the dyers themselves have raised the problems in the dyeing of yarns. These problems are related to colour fastness and absence of any sort of precision in shades. This has been studied in detail and found that the use of improper dyes, dyeing techniques and poor business systems of the cluster are responsible for these problems.

(iii) Traders refuse to buy all saris from master weavers:

Earlier the traders of Bhairu Gali, Kota used to give orders and also advance for making the saris. However, with time the master weavers of Kaithun started giving the orders to the weavers for saris and started supplying the same to the traders in Kota. This shifted the responsibility of payments to the weavers from the traders to the master weavers and the burden of any unsold/ defective saris on these master weavers. Now the traders take only those saris that they wish to keep in their shops and these have to compete with their power loom made competitors and other types of cheaper saris. The traders also do so because they have now turned into “sari traders” rather than “Kota Doria traders/manufacturers”.

(iv) No design & product development:

There is no conscious effort for evolution of designs. Since primarily Kota Doria did not have any distinctive motifs and had just plain checks of zari with plain borders, the motifs were introduced as per the intervening agency/designer/market feedback at that particular point of time. Many a times, this meant a simple copying of some other sari's motifs onto the Kota Doria fabric. Thus, the existing range of motifs is motley of various influences, regardless of any local ethnic appeal.

The situation is further degraded due to a dearth of graph designers and any conscious effort on part of the master weavers to do something new. There is hardly any complementation between the motifs on the various parts of the same sari. There is no product diversification besides saris and a very little amount of ladies suits. As such the whole cluster is making saris with repetitive designs.

(v) Limited market knowledge of master weavers:

The master weavers, subsequent to the decline in the purchase by the Bhairu Gali traders, have started going to different cities and selling the saris even by door-to-door selling. This has brought down the image of this sari and also put the master weavers, weavers and traders of Kota in mutual competition in

terms of price. The master weavers do not have the knowledge and capacities to tap the more high-end and receptive markets.

(vi) Competition from power loom:

Most of the weavers and master weavers feel that their major problems are due to the power loom fakes flooding the markets and sidelining their saris in terms of price, apparently good finish and attractive designs. However, they seem to be unable to realise that this is partly related to their own lack of dynamism. They feel that government should do something about this, since Kota Doria is reserved for production on handloom only as per the Handloom Act, 1985.

(vii) Quality problems of saris:

Lack of any sort of post-weaving finishing renders the hand woven saris less attractive in a sales counter. However, the traders of Kota do not appreciate any finishing after weaving due to a fear that by doing so even several months' old saris would find place in their shops. The quality issues are related to the quality of zari (insistence of the weaving community on only a particular minimum standard not appreciated by traders of Kota who want the introduction of duplicate zari instead), colour fastness, weaving defects such as slub, knots etc., proper length and breadth of the sari, improper placement of motifs, etc.

(viii) Lack of awareness about real Kota Doria:

Mostly the consumers are sold the power loom fakes in the name of real Kota Doria since the distinction between the two is not easy for any nonprofessional. Hence, while Kota Doria is well known by its '*khat*', the "Real Kota Doria" is not known to most of the consumers. This is one of the major factors for the power loom threat to the hand-woven Kota Doria. This threat is even greater in plain fabric rather than sari, since the plain fabric is further printed/ converted into different end products, in which the cost advantage and lack of any apparent difference makes power-loom made material the favored choice.

(ix) No efforts for brand promotion:

The master weavers and the weavers have been relying on the traders of Kota to take care of selling and promotion of their product. Now the brand

image of Kota Doria is at a risk due to the power loom fakes being sold in bulk as 'Kota Doria'. Since the power-loom fake uses artificial zari, it not only beats the original Kota Doria on the price front but at the same time devalues the image of the hand-woven fabric in the eyes of a consumer. Thus a high-quality-high-price handloom product loses out to its power-loom sibling since both look at the first sight almost the same.

Since the receptive high-end markets are unknown and the risk involved in tapping such markets is perceived to be high by the weaving community and the traditional markets have been penetrated by the power-loom material, there are hardly any clues in the minds of the weavers and the master weavers about aggressively promoting the brand image of real handmade Kota Doria having pure zari.

Brand promotion of real Kota Doria is also not in the business plan of the Kota traders since they have already earned a reputation of "manufacturers and wholesalers of real Kota Doria" over a period of time, they are comfortably pushing the power-loom made Kota Doria in the name of "real Kota Doria" and making hefty profits.

(x) Unsold stocks:

The master weavers have developed unsold stocks of saris, which have been rejected by the traders of Kota and they were unable to sell them in their door-to-door efforts too. While some of these have some genuine defects, some have just not been liked in the market. This has resulted in blockage of some capital of the master weavers and wages of the weavers.

(xi) Seasonal demand of product:

'Kota saris are suitable for summers only'- has been the general view of the consumers as well as the producers. The tissue' variety introduced by the weavers for the winter season and festive occasions, having zari instead of cotton in the weft, makes the sari very expensive. Hence, the pressure of production during the months immediately preceding the summers is more and at that time due to improper production management and hurried production, quality compromises are much more.

4.2 Issues observed and verified

(i) Usage of old looms:

The use of pit looms with a throw-shuttle technique is one of the major areas of concern since they limit the production capacities of a weaver by almost one third of a handloom (frame loom) having a fly-shuttle process, as estimated by some textile experts. The resistance towards the adoption of new looms is partly due to (i) fear of greater production without sales and thereby stock piling (ii) lack of funds for buying new looms, (iii) space problems in most houses to accommodate these bigger looms and (iv) a misconception that the traditional '*khat*' would not develop in the new looms.

(ii) Limited exposure:

Most of the problems as stated earlier are due to the highly conservative mindset of the weaving community. This itself is linked to a very limited exposure of these people and thereby their false pride in being the best weavers and having all the knowledge.

(iii) Poor pre-weaving processing:

The pre weaving processes such as pirning, peg warping, loom setting, maandi-application, washing and dyeing, all are of a very primitive nature and obsolete. These not only deteriorate the quality of the final product but also highly limit the scope of any increase in the productivity levels of the cluster. As a result, earnings of the weavers are very low.

(iv) No linkage with exporters/boutiques:

There is hardly any direct linkage of the master weavers with good boutiques or exporters. This limits their knowledge, readiness to adapt new ideas, variety of products and a dependence on the traditional exploitative traders of Kota.

(v) No control on pace of supply by master weavers:

The master weavers do not have much control over the timely delivery of finished saris by the weavers. Since the weavers take their own time to complete an order and sometimes even do not finish the sari at all, the master weavers do not find themselves ready for any kinds of commitments. This

affects their scope of business transactions and order servicing of distant shopkeepers.

(vi) Master weavers utilizes traditional marketing channels only:

As mentioned already, the master weavers rely very much on the trades of Kota for majority of their sales and are not able to achieve much sales through their own efforts due to the established contacts of the traders of Kota in the same markets.

(vii) Low sales volume of master weaver:

Slow production processes, delays by the weavers and lack of sufficient capital to upscale their operations results in less production of saris in a given time and therefore the overall sales volume of most of the master weavers is very low in comparison to other handloom clusters.

(viii) No product diversification:

There is no diversification into any other product range except saris at the cluster level. However, some boutique owners and exporters finish the plain fabric into a variety of products. This lack of value addition at the cluster level results in low earnings of the weavers' families.

(ix) Limited consumer segment:

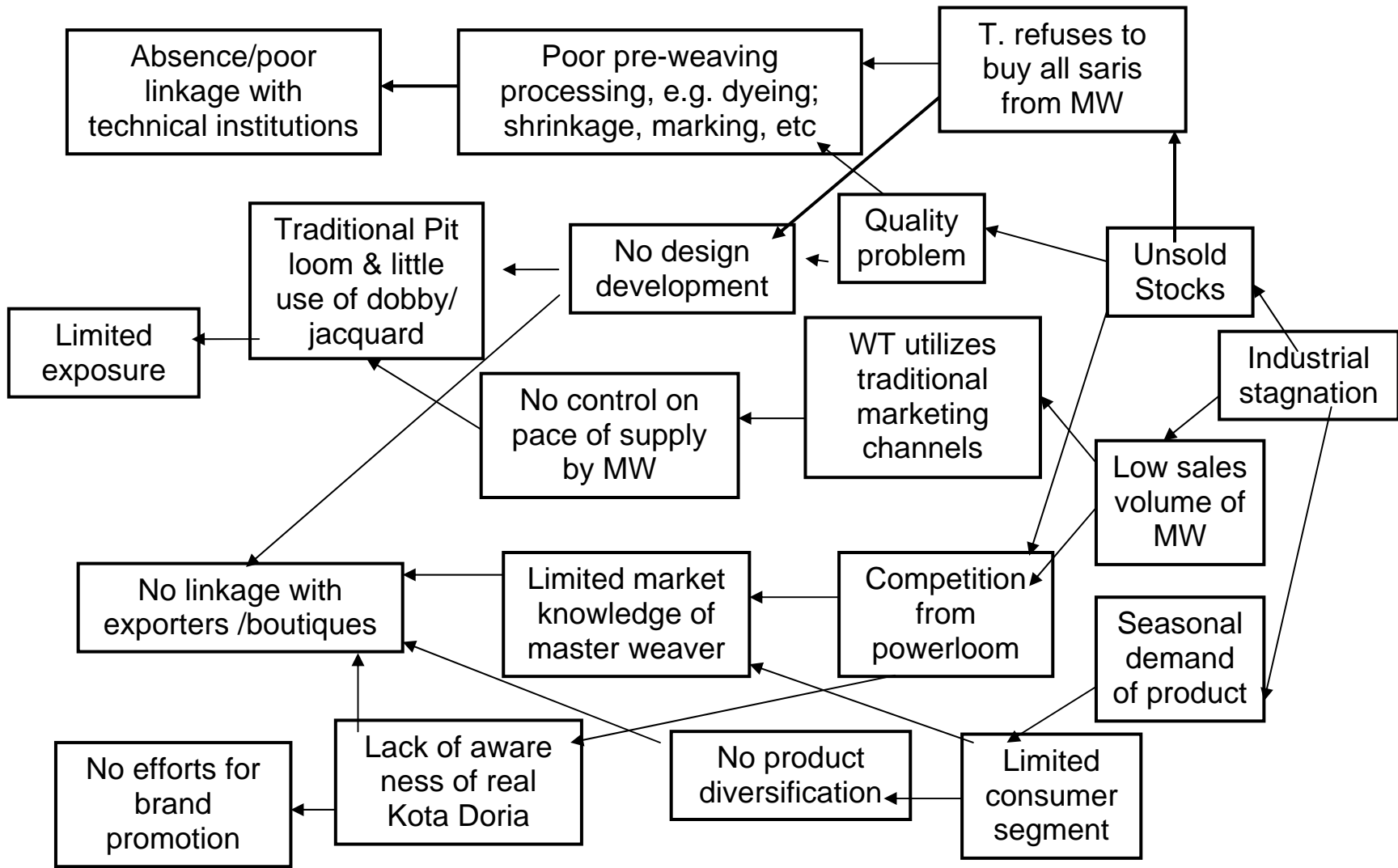
Traditional support to Kota Doria has been by the 'Oswal' community and there too only the sari-wearing women. Since the number of sari-wearing women has come down drastically, especially in the younger generation, it adversely affects the cluster. Moreover, the use of pure zari renders these saris expensive for most of the consumers. This again limits the consumer segment of this fabric.

(x) Industrial stagnation:

Since the wages from this craft are very low in comparison to other type of occupations, the younger generation is generally disinterested in pursuing the tradition of weaving. Many households do weaving only if there are orders or else settle working as agricultural labourers. Such a scenario is more pronounced in remote village such as Siswali and Kotsuwan, where business links are even lesser than Kaithun and thereby low demand.

Based on these issues, the reality tree drawn up appears below.

Reality Tree for Kota Doria



Porter's Framework for Kota Doria

<i>Porter's determinants</i>	<i>Score</i>	<i>Remarks and Status</i>
Factor conditions: 1 Raw material availability 2 Quality of raw material 3 Human resource and skill availability 4 Knowledge of the activity 5 Capital availability 6 Availability of infrastructure	3 2 5 4 2 3	Cotton & silk available throughout the year Quality of raw material inconsistent, becomes brittle after processing Human resource present in abundance & skills are traditionally inherited Traditional base of artisans for whom weaving is a family trade The artisan's requirements are minimal but lack of working capital for Master weavers Poor road connectivity, lack of communication, consistent power supply & space
Demand conditions: 1. Size of domestic market 2. Number of buyers 3. Growth rate of domestic demand 4. Sophistication of buyers 5. Presence of inter-regional buyers	3 2 2 2 3	Sold all over the country but limited consumer segment No. of buyers stagnant/decreasing since only saris being made Growth rate decreasing since last 2 years, due to cheaper power loom substitutes Customers have low quality orientation and cannot distinguish a copy from an original Patronization by 'Oswal' community decreasing due to disinterest of younger generation, which does not find the fabric suitable for modern dresses
Size and structure of firms: 1. Number of firms 2. Size / efficiency of the firm 3. Existence of rivalry (among firms) 4. Formation of new firms 5. Congruence b/w sub-sector & firm goals	4 3 4 2 4	Large no. of households into weaving activity Home-based units, efficiency limited by space, technology & capital Intense rivalry among the firms, unorganized & internal price war New trade is unfeasible as low margins realized due to sluggish Dwindling market restricts deters setting of new looms Quality & design development lead to better margins but weavers more bothered about immediate gains
Related and supporting industries: <ul style="list-style-type: none"> • Design / product development • Marketing network • Market research • Advertising • Training • Research & development • Component & machinery suppliers • Existence of promotional institutions • Existence of producer's associations 	2 2 2 2 3 2 2 2	Design development by improvisation, product development is rare Sub-contracting system with market-led production, traders exploitative No market research for product diversification or better margins No promotional efforts to project the hand woven nature No training institutions geared to the demands of the cluster R & D needs to be undertaken for product development, better productivity, etc. Pit loom requirements are minimal, and met by the local craftsmen ATIRA, BTIRA, NHDC, WSC, NSIC/RSIC, SISI, SIDBI, HEPC, DC (H&H) etc. need to be linked Coops defunct, associations and union uninterested in development activities

Code: (1- highly unfavourable, 2- unfavourable, 3- neutral, 4- favourable, 5- highly favourable)

5. Cluster Vision

Kota Doria will offer its unique high value added fabric mainly to exporters and niche retail stores and create a consumer awareness of its product. This vision can be further scaled into the following quantifiable indicators:

A. Output:

An increase in the output by at least 70% is envisaged; i.e. from the present level of approximately 450000 metres, to about 765000 metres.

B. Product Range:

The present pre-occupation with saris would be supplemented with a variety of garments, home accessories, furnishings and other similar product ranges such that at least 25% of the production would be that of the new products.

C. Value Addition:

Greater value addition in weaving and dyeing, as well as value addition in post-weaving finishing and other processes is envisaged. It is envisaged that not only fabric production but further manufacturing of the end products would be taken up by the cluster's other people themselves.

D. Marketing:

- Marketing through boutiques, exporters, high-end niche stores, fairs, exhibitions and well-organised buyer seller meets would add to the marketing through the present channel of Kota Traders. At least 50% of the production would be passed through the newly created marketing channels.
- High value – for – money” Image of Kota Doria would be established amongst the consumers.
- Brand image of Kota Doria as a “high-value-high-quality product” would be entrenched deeply in the minds of the consumers.
- The present consumer segment consisting of mainly sari-wearing *Marwari* women would be broadened to not only other sari-wearing women but also the younger generation regardless of any caste who are fond of exquisite, good quality handmade fabrics.

E. Business Environment:

- Wage rates would rise by at least 15% to enable the weavers a better standard of living
- Productivity would grow by at least 50% with the technological improvements in processes related to warping, sizing, weaving etc.
- Improvement in business systems to streamline production, marketing, sub contracting etc. would be established.
- Margins of the master weavers would increase from present 4-5% to at least 10-15%.

6. Strategy

Strategy for intervention will be sustainable activities with business generation. These activities would be conducted through the involvement of the master weavers of Kaithun and the weavers of Kotsuwan. Besides the technological, design and marketing interventions, welfare activities would also be planned. Given the political conditions of Kaithun and the history of failure of the interventions of other agencies related to technological interventions, experimentation for completely new ideas would be initially tried in Kotsuwan, having a more receptive community and thereafter, disseminate and replicate the same in Kaithun. Looking to the better financial conditions and the urge for marketing tie-ups of the Kaithun's master weavers, while the activities with them would be planned by active involvement of Exporters/ Boutique Owners and other up-market sales channels, the strategy for intervention in Kotsuwan could be NGO-led.

- (a) **Exporter/ Boutique-led growth:** Exporters/boutique led marketing activity can be induced to the cluster to create a sustainable marketing channel from the very beginning. The other players to be involved in the process are cluster development agent (CDA), network development agent (NDA), support institution. The value addition by each will be as follows:

- (1) Exporter/boutique: Market information, raw materials of new types, marketing risk, sales promotion efforts.
 - (2) Master Weaver/Weaver: Preparation of fabric, usage of newer types of cotton/silk, improved dyeing, new looms.
 - (3) NDA: Follow-up with groups for production, weaver-exporter/weaver-CDA/weaver-support institution linkages and enlargement of group. The NDA should preferably be a local person with technical/marketing/ group handling experience.
 - (4) Support Institution: Designer support, NDA support, support for new looms, technical training support.
 - (5) CDA: Identification of exporters and linkage with weavers, NDA selection & support (initial phase) and support technical institution, creation of network and propagation of success stories and socio-political balancing.
- (b) **NGO-led:** Here for all purposes, the exporter will be replaced by an NGO. But to make this sustainable over a period of time, the following attributes of an NGO will be necessary.
- (1) The NGO should be focused and will have no other issue for development apart from the welfare of Kota handloom for 1/2 villages for an initial period of 5 years.
 - (2) However it can take up other related cause of the 1/2 villages to strike a social balance and create trust with the weavers and be a part of them.
 - (3) The NGO will be fully supported by UNIDO/support institution for a period of 2-3 years (depending on the ground condition).
 - (4) The NGO should continue to work in that 1/2 village or extend its operation in nearby villages for similar (Kota handloom related) activities only.
 - (5) The NGO can handover the operation to the villages once they are in a position to do so.

In the absence of such hand holding it will be difficult to work toward permanent self-sustainability when the weavers will accept and support such BDS as a market phenomenon. Since no such NGO could be located, such NGOs can be created by planting dedicated individuals with one or more areas of comparative advantages

(e.g. technical/ marketing/ group management). The NGO can be a one-/ two-person team to start with. Such a team can be located from known/related local database. It may be mentioned here that an analysis of successful craft based NGOs owes their origin to focus and dedication. The strategy would be to build the capacities of such a group and thereby create their stakes in the project. Thereafter, the NGO would automatically look for more activities in the area and funds for the same.

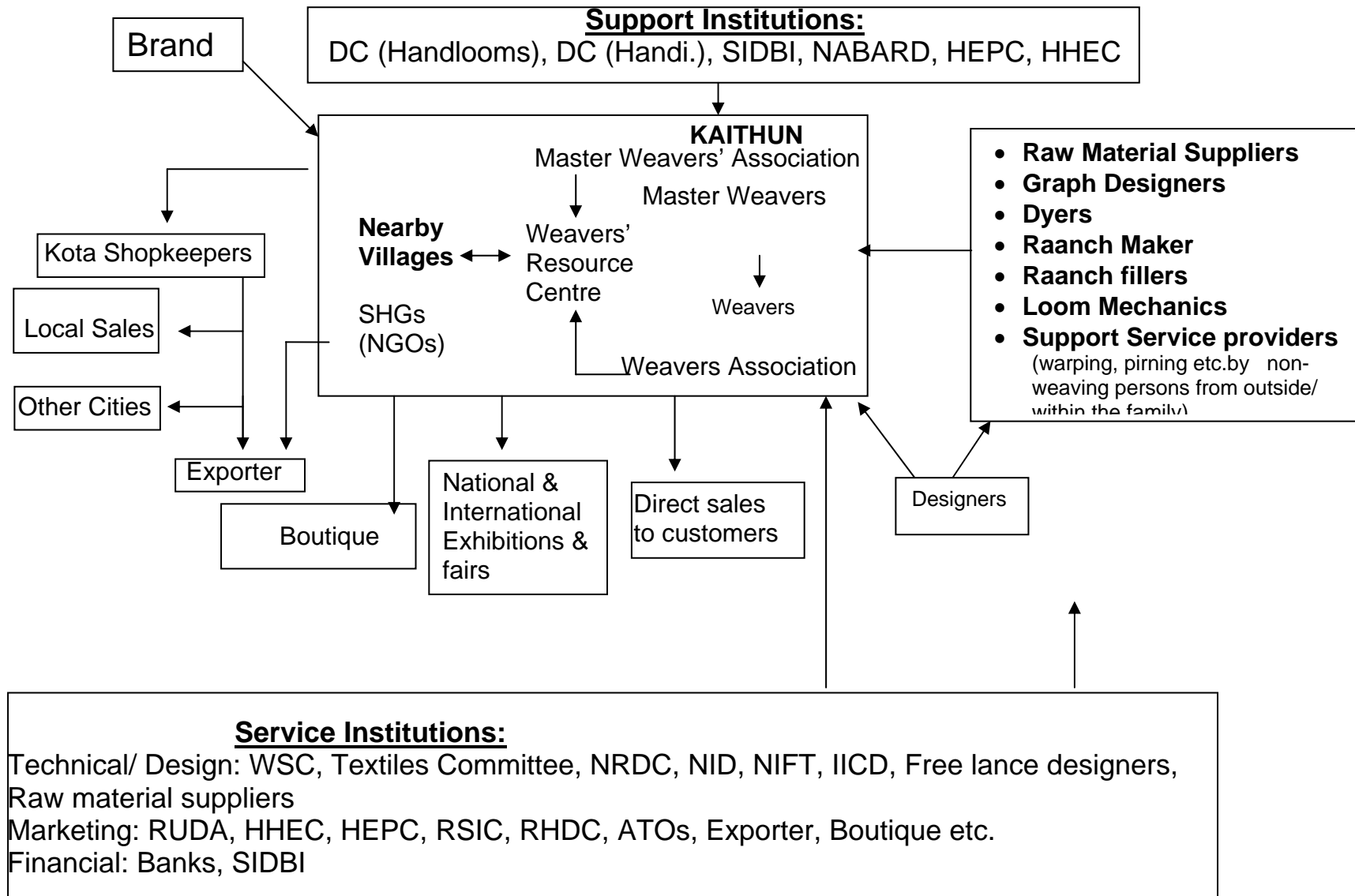
Some other innovative ideas, which are proposed for the intervention at the cluster, are:

- Creation of young students' groups from the local design institutes and other vocational training institutes, build their capacities, provide exposure and link this group with exporters/ boutique owners situated far away from the cluster so that the group may take more and more activities in the cluster as a business activity for themselves.
- Capacity building of the local design and vocational institutions for serving as effective BDS providers to the cluster
- It is also planned that a small resource centre would be set up in the cluster and this would initiate as a common place for having meetings, consultation of literature relevant to their business, serve as a place for small classroom type of trainings whenever required. Over a period, as the sense of ownership for such a centre would develop in the cluster actors, they would be motivated to stock it up with the requisite type of infrastructure and support staff so that efficient BDS can be obtained by all the cluster actors from this centre. The sustenance of this Weavers' Resource Centre (WRC) would be further ensured by involvement of various support institutions who in future would be able to pass on their interventions from this centre to all the receptive clients. Furthermore, whenever the plan of the weavers' colony would materialize, this resource centre may double up as a common marketing outlet and exhibition place and at the same time a giver of information related to design, markets etc.

7. The future cluster map

The future cluster map as envisaged also tells about the setting up of a Weavers' Resource Centre (WRC) jointly controlled by the Master Weavers' Association and the Weavers' Union. This WRC would serve as the hub centre of all activities for the cluster and provide a range of business development services to not only the workers of Kaithun but also of the smaller villages such as Kotsuwan. This resource centre would be linked with the various support and service institutions to make it possible for the cluster's workers to avail the business development services of these institutions as and when required. The future cluster map is depicted as annex 7.

Future Cluster Map of Kota



8. Action Plan

To start with, activities at the Kota cluster will hover around creation of ambition and address issues related to technical and marketing problems. It would be important to mention here that for achieving these goals the weaving community would have to be better organized, significance of group behavior and collective efficiencies would have to be emphasized and demonstrated and building of mutual trust would be the undercurrent for all these diverse kind of activities.

8.1 Creation of ambition

- Exposure

Exposure would play a very significant role in not only molding the mindsets of the cluster actors but would also help them formulate a vision and long term strategy for their traditional trade. It would also help them gear up their systems to meet the new market challenges and thereafter always keep them abreast of any changes from time to time.

- Talks

Talks given by various subject experts would provide the requisite technical insight to the weavers and master weavers about their own traditional craft and in this manner help them to visualize new concepts and untried techniques in the weaving process.

- Interactions

Interaction of the cluster actors with not only various support institutions, designers but also with other handloom clusters is envisaged to give them the necessary space for communication and exchange of new ideas.

- Product pricing

A thorough insight into the details of costing and pricing of their fabric is very much a necessity for these cluster actors so that they may look at sustainable and profitable marketing channels. This would also help them finding out the ways of keeping themselves competitive in comparison to not just power-loom fakes but also the other handloom products.

- Providing technical knowledge

The cluster actors have done the things more out of tradition and practice rather than a proper understanding of the nuances of any practice/ procedure. Deep insight

about their practices would not only instill confidence in them but also help them come out of the set mode of thinking and doing things. This would let them find out new ways of carrying out the various processes to improve their efficiency.

Technical issues

- Colour fastness
- Introduction of eco-friendly and price-competitive dyes
- Creating mechanisms for continuous and non-breakage weaving
- Reduction in the time consumed for warping, winding, piecing, denting etc.
- Introduction of innovative yarn combination for creation of furnishings
- Innovative marking patterns on clothes to show yardage counts
- Introduction of faster hand operated looms, warping drums etc.

Design & product development related issues

- Supplementing the saris with other types of products
- Proper cataloguing of graphs, motifs and evolution of new themes from the same
- Development of new designs which enhance the beauty of the traditional '*khat*'
- Linkages with design institutions and freelance designers

Marketing issues

- Market surveys

Market surveys are planned to be carried out in various important cities of the country and assess the prospects of Kota Doria in these markets in different consumer segments. Such information would help in designing the new product line.

- Exporter and private boutique led growth

Linkages with exporters or private boutique owners would be planned to develop sustainable marketing channels for the fabric so that it reaches the receptive consumers who can appreciate the finery of the craftsmanship of these weavers. These linkages would also help in nurturing the image of Kota Doria as a high value-high quality product.

- Joint participation in specialized fairs with new products/designs

Joint participation of the weavers/ master weavers in various fairs, exhibitions and other marketing events organized by not only government organizations but even private agencies would help in retail sales, development of customer relationships and direct interaction with consumers and the weavers, thus giving good opportunity to the latter for understanding consumer tastes.

- Building up the image of Kota Doria and promotion of this brand

Image and brand building of Kota Doria is the only way by which the threat of power-loom made fakes can be minimized and for this various measures are envisaged during the project.

- Development of a common website for Kota Doria: to attract the attention of the overseas buyers also

Proposed Activities for Year 2002

The following activities are proposed to be carried out during the year 2002, on the basis of the initial discussions held with the weavers, master weavers and other cluster actors of the cluster:

- Assessment of detailed technical needs
- Identification of suitable professional for solving the dyeing issues and taking further necessary activities related to it
- Dialogue of the master weavers of Kaithun with exporters in Jaipur
- Exposure visit to benchmark marketing and technically sound clusters
- Setting up of a small resource centre with magazines etc. in Kaithun
- Participation in marketing events