

**GOVERNMENT OF INDIA
MINISTRY OF SSI
SMALL INDUSTRIES SERVICE INSTITUTE,
34, INDUSTRIAL ESTATE, NUNHAI,, AGRA**

PRESENTS

**DIAGNOSTIC STUDY REPORT
FOR
LEATHER FOOTWEAR CLUSTER,
AGRA**

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Declaration

The information given in this report is purely based on estimates and field work. Anyway it is advice that before taking any final decision on the figure more up-to-date information should be collected by the readers.

1. INTRODUCTION TO THE CITY OF TAJ

Agra is situated on the banks of river Yamuna. The legendary city of Agra reserves space in the memory of historians, architects, industrialists and of course tourists from the world over.

Agra is very well known as the city of Taj / City of Suleh Kul (Peace & harmony). A new religion known as Deen E Elahi which was started by Akbar the great was born here and the head quarter of Radha Soami religion is also situated here only. Apart of tourist interest, Agra is very rich in Indian Heritage, Culture, Education, Handicraft and industry etc. Famous Urdu Poet Mirza Ghalib , Meer Taki Meer , Shakespeare of the East Nazeer Akbarabadi, Great Indian Poet Sur Das, Noted Hindi writer Babu Gulab Rai were among the Great Personalities this City produced. Noted freedom fighter Pt. Moti Lal Nehru, President of India Dr. Shanker Dayal Sharma, Prime Minister Mr. Chodhry Charan Singh, Noted politician Mulayam Singh Yadav are among the few pillars who were associated in educational line or got education from Agra.

1.1. BRIEF HISTORY OF AGRA

Agra is an old city and in great epic ‘Mahabharat’, the region of Agra is described as ‘Agrabana’ (an integral part of the Brij Bhumi or the land of Lord Krishna). The latter part of Indian history outlines the origin of Agra to 1475 A.D.; when the region found its existence during the reign of Raja Badal Singh. However; Agra came into limelight during the rule of Afghan King Sikandar Lodi who hade made it the capital of his empire. Later in 1526 A.D., the Mughal Emperor Babar took upon himself the task of rendering Agra, a unique character and beauty of its own. The visionary that he was and a great patron of the arts, Emperor Babar brought in a change in culture and lifestyle among the people of Agra, which then brought some of the finest craftsmen, artist, statesmen, warriors and nobility. This part of India had ever witnessed. The Golden age of Agra’s history thus began to set in.

The next few years of Agra witnessed the rise of the pomp and pageantry of three great Monarchs-Emperor Akbar; Jahangir and Shahjahan, all of whom lavished on this fabled city, their love and riches Immeasurable to transform the land into one of the great centers of art, culture, learning, industry and commerce.

Agra has the wonders Taj Mahal and perhaps no other historical monument has evoked as much awe and admiration from tourists and travelers alike, as the magnificent Taj Mahal, fondly called by people as the ultimate requiem of love, from a great Mughal Emperor to his beloved. So over whelming is the exquisite beauty and presence of this marbled mausoleum that centuries later today, even the very land where it has been located Agra has been “immortalized as the city of the Taj. Yet, it doesn’t take much for the roving eye to discover that there’s more to Agra than just the fabled Taj Mahal. The city is a virtual gateway of a world of discovery... A freeze-frame from a resplendent era that’s long since gone by.

Much of the city’s impressive part is alive even today, and is reflected in the haunting presence inside the Monuments, in the majesty of the buildings, the exquisite arts and crafts and not to forget, the lure exceptional cuisine... all, cherished as priceless legacies of the nostalgic past.

The older city of Agra has impressively retained much of its resplendent history... captivating every visitor with fond memories to take back home. Today, luxury and modern convenience also exist adjacent to tradition-luxury hotels, shopping malls and plazas, wide, avenues and a superb choice of Venues for recreation, business, sports, pleasure, education and the arts.

1.2. Geographical Features

Description of the District

Agra is situated in the western zone most precisely west south of the UP state. The area is merely 1.55% of total land of the state but is probably most important and well known place not only in Uttar Pradesh but also in India so as in the world. The north boundary of the district touches the Etah and the Mathura, which is the birth place of Lord Krishna, is famous not only in India but also in the whole world. In the East it touches Etawah and Firozabad, which is famous for its glass and bangle industry. The west and south boundaries of the district touches the state of the Rajasthan and Madhya Pradesh. In the west it touches Bharatpur of Rajasthan state, which is famous for its fort and Ghana Birds centaury. River Yamuna divides into parts. The district is very well connected with air, roads and railways to nearly to all major cities of the country. The importance of the city is more due to the proximity with national capital Delhi that is international tourist and business centre and is connected by a four lane super highway. Agra is very well connected with all major cities by road and by highway. There are central railway, western railway and North West railway services available with both meter and broad gauge railway lines to facilitate the incoming tourist / pilgrims from across the country. These facilities are also very

fruitful for industries in respect of transportation of raw materials and finished goods. Recently Agra has become zonal office of newly formed North Central Railway.

1.3. INDUSTRIAL BACK GROUND

AGRA – INDUSTRY AND BUSINESS CENTRE FOR LONG

Agra is the head quarter of the Divisional Commissioner and SISI with a large area adjacent to it has been one of the premier centers of trade and industry from time immemorial. Agra for a quite long time also remained capital of the country. As back as in 15th century, Foundry industry of the region was quite developed. It is corroborated by the very fact that art inherited by artisans from generation to generation is of such a standard that some times casting by hand is superior to that by machine. This also holds good for the artisans of marble-craft and shoe-craft. Traders of the region had access to global markets, especially to the Middle East and to the Far East.

Items being produced by Agra region and enjoying world wide reputation are predominantly castings, diesel engines, generators and pumping sets, leather footwear and leather goods, carpet and durries / (cotton rugs), glass and glass products, marble art, locks & scissors, automobile components-both OE and replacement, artificial jewellery , ready- made garments.

The technology has here kept pace with the development and today Agra, which was centre for CI castings, has also started manufacturing of SG iron castings for wide applications in automobile, railway, marine, diesel industrial engines and compressors. The place is now also known for quality production of special steel castings like manganese steels and alloy steel and grinding media balls manhole covers, GI pipe fittings etc.

Agra produces Diesel engines with the capacity ranging from 3.5 HP to 20.5 HP for multipurpose applications. Apart from catering the vast requirement of domestic market, diesel engine, Gen. Sets and pump sets are being exported to Middle East, Far East and to SAARC nations.

Leather footwear of Agra is, known in the world for superb craftsmanship. Fully handmade shoes are class apart. No other place in the world does this trade related activity in a day more than Agra. Whooping 60 million per annum production is cost effective too. Apart from catering the best requirement of domestic market, Footwear and shoe uppers being exported

to Europe and other foreign countries. Garments, purses, valets, belts are other products of leather known for craftsmanship and quality.

Transformers and other power distribution equipments are of the quality comparable to the best in the world and that is why we succeed in winning stiff global bids. The range is wide and cost is reasonable.

Agra artisans are second to none in marble inlay work in the world. This item and other masterpieces curved out of marble are exported in the entire world. Granite and marble slabs for various applications are also exported from Agra. Mines adjacent to Agra are source of uninterrupted supply of these items.

Agra is also dependable source of supply of wire brushes to the defence for clean the barrel of guns and tanks. There are lots of registered and unregistered units which are manufacturing the wire brushes to the domestic markets.

Milk and milk products are also in abundance in the region. Dairy products, Petha, Dalmonth and Pickles are the products imported by many countries from here. People of this region have also entered into a new area of Floriculture. Overseas requirements are pouring in with speed. Agra is also a dependable source of supply of ready-made garments, medical equipments and devices, biological teaching aids, detergent powder and soap etc.

Large numbers of industrial units of the region are ISO: 9000 accredited for International Quality Standards. Export Processing Industrial Park, Software Technology Park and Inland Container Depot facilitating direct export and import are also available here. Region is also an ideal place for foreign direct investment, technology transfer and equity participant.

Agra has thus emerged as rendezvous for entrepreneurs of India and abroad, a favored destination for global business negotiations.

In brief, Agra is known for Carpets, Leather Shoes and Goods, Wire brushes, Cast Iron Pipe Fittings, Motor and Tractor parts, Metric Weights and Measurement, Machinery for Glass and Textile factories, Diesel Engines, Pumping sets, Generating Sets, Agriculture Implements & Iron foundries. A unique specialty of the city is the delicious Dalmonth and Sweet Dish called "Petha" & Namkeen Dalmonth. Agra is a cosmopolitan city with habitants of various sects, classes, religious and social groups.

1.4. Importance of Clustering

In present Industrial scenario the researchers have highlighted the opportunities created by networking among enterprises located in geographical proximity i.e. Industrial Clusters. This process of networking and clustering substantially contribute to the competitiveness, growth, Technological dynamism and efficiency of the participating firms. The evidence suggests that horizontal collaboration between small and medium sized enterprises yields collective efficiency in the form of reduced transaction costs, accelerated innovation through rapid problem solving and greater market access. Besides positive externalities are generated by agglomerations through the availability of:-

- I. Skilled labour and inputs
- II. Creation types of infrastructure
- III. Innovation generating informal exchanges

Further, political and social institutions along with various policies can play a crucial role in supporting the emergence and development of such network. In fact, in most of the European successor's stories of networking in industrial clusters regional and local governments played crucial roles. The available evidence of developing countries like China, Korea, etc. also suggests the clustering and networking help small and medium sized firm (SMEs) to raise their competitiveness.

1.5. The Indian Leather Industry

The Indian Leather Industry occupies a place of prominence in the Indian economy in view of its substantial export earnings, employment generation and growth. There has been increasing emphasis on its planned development, aimed at optimum Utilization of available raw material for maximizing the returns particularly from export. India is the largest livestock holding country which share 21% of large animals and 11% of small animals.

The export of leather and leather products increased manifold over the past decades. The export increased from Rs.28 Crore in 1956-1957 and from Rs.3056 Corer in 1991-1992 to Rs.9624 Crore in 2003-2004. Today the industry ranks 8th in the export trade in term of foreign exchange earnings of the country. The composition of export of leather products from India has undergone a structural change during the last three decades, from merely an exporter of raw material in the sixties to that value added products in the nineties. The value added finished products presently constitute around 80% of the total exports from the Industry, which were 7% in 1956-1957.

The major production centers for leather and leather products are located in Tamil Nadu, West Bengal, Uttar Pradesh, Punjab, New Delhi, Haryana and Mumbai. The India produces 2 Billion sq ft of leather annually. This Industry can be classified in five groups as Training & Finishing, Footwear & Components, Leather garments, Leather Goods, Saddlery and harness articles.

India exports of leather and leather products for five year during 1999-2000 to 2003-2004 are given below:-

(value in Million US\$)

Category	April-March				
	1999-2000	2000-2001	2001-2002	2002-2003	2003-2004
Finished Leather	239.82	381.49	450.25	508.83	519.38
Leather Footwear	377.39	381.37	395.39	423.83	539.70
Non-Leather Footwear	215.09	238.09	233.94	175.07	149.82
Footwear Components	347.28	460.45	378.75	272.08	295.00
Leather Garments	278.72	343.76	321.46	335.36	333.48
Leather Goods	34.11	42.66	35.64	43.66	51.94
Saddlery And Harness	97.80	96.61	85.69	90.04	136.01
Leather Gloves. ³⁹	14.12	19.11	26.02	26.88	69.00
Total	1604.35	1963.55	1936.14	1875.21	2094.33

Source: CLE

1.6. Brief Description of Indian Footwear Industry

The Indian leather footwear Industry has undergone remarkable changes during the last three decades, with the large raw material reserve, access to large supply of labour and management. The factory sector of the footwear industry has made rapid strides in the production and export of shoe uppers and full shoes. The government's , trade and industrial policies, institutional support, coupled with progressive entrepreneurship growing demand for export and domestic demand have been the major factors contributing its growth.

The clinical changes in the footwear manufacture have brought about traceable and tangible mechanization in the industry. The footwear industry in India is the second largest employer in the country. As per estimated data available the production capacity of the footwear are as follows:-

S.N.	PRODUCT	PRODUCTION (CAPACITY)
1.	Leather Footwear	776 million pairs
2.	Leather Shoe Uppers	112 million pairs
3.	Non Leather Footwear	960 million pairs

Source: CLE members Directory - 2005

The bulk of production activities have shifted from rural to urban centers. Large Scale migration of footwear artisans has taken place from rural to urban areas in search of employment. The Traditional artisans mustering the support of their family members have set up numbers household Units in several urban peripheries to meet the increasing domestic demand.

1.7. Per Capita Consumption

The per capita consumption of footwear (Leather and non Leather) according to this assumption has grown from 0.8 pairs 1985-1986 to 1.1 pairs in 1990-1991 and is expected to grow to a level of 1.5pairs by 2004-2005. This per capita consumption is far below that of the USA with 3.2 pairs yearly and 4.5 pairs yearly in the UK.

2. Status of Footwear Cluster in Agra

Introduction

Agra, India's most diverse as well as most tightly knit footwear cluster is a prime example of an artisanally rooted, low-cast cluster with predominantly Cottage/small scale manufactures. It was specialized in cheap hand made build up shoes. Agra is charaterised by a cast based artisanal community that makes and a traders community that sales.

The shoe industry in Agra is characterized by an abundance of highly skilled workers and concentration of necessary ancillary units. In addition Agra has a well developed whole sale market both for raw materials and shoes. The ancillary factories also exist for the production of leather board, microcellular rubber sheet (MCR), EVA sheets, shoe lasts, PVC, TPR, PU unit sole, air mixed PVC sole and footwear tools, equipments and machines. The rapid changes that have taken place by a way of technological development, transformation of specialized skills, organizational improvements on one hand and tremendous changes in demand for variety of shoes both in domestic and international markets on other hand, were responsible for the growth of this industry in Agra.

2.1 The clustering Phenomena

Agra is one of the important centers for shoe production in India since medieval Mughal Era. The footwear industry used to grow and gradually occupied one of the most prestigious places in the country. But it is the most Tragic that footwear industry did not follow any regulated pattern of development, some grew in to most modern and sophisticated and while other remained old and traditional.

Agra is a larger footwear manufacturing center, in India, having around 60,000 skilled workers and providing employment to around one lack persons in around mostly 5000 cottage, (home based) SMEs entrepreneurs producing about 90 million pairs of shoes and 110 million pairs of sandals and chappals annually, which satisfies approximately 53% of the domestic requirement of the footwear. Traditionally, this has also been a center of cottage industry production, based on family run production units operating from home, however as the production volume increased, these individual units converted into the organized units, there by improving working standards and conditions. About 25% population of Agra city is directly or indirectly earning their lively hood through this industry.

2.2 Development of the Footwear Cluster in Agra

The most important developments have taken place in the footwear industry in Agra since 1970s with a change in the organization of the production, marketing, invention of new technology for methods of construction and use of raw materials for producing the footwear.

With a view to assist house hold artisans, cottage and small scale units in marketing of shoes and providing financial, technical assistance the Uttar Pradesh Leather Development Corporation (LAMCO), SISI, CFTC, Bharat Leather Corporation (BLC), Bhartiya Charm Udyog Sangh, KVIC has played the crucial road for development of this sector by providing Technical assistance and selling their products in the country through their network. But due to some administrative reason LAMCO and BLC have closed down their activity since last 5 to 7 years. Then the artisans again depended to sell their products to the whole sellers' commission agents.

The following table shows the illustrative growth of the modernisation of the footwear industry:-

S.N.	Year	No. of Mechanised Units	No. of Semi Mechanised Units
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1.	1970	10	50
2.	1980	15	85
3.	1990	25	120
4.	2000	40	180
5.	2005	50	200

The process of emergence of footwear cluster in Agra is very old since Mughal Era. Due to change in the technology and availability in skilled labour in Agra the units like Bata India, Carona and others helped the shoe industry of Agra to grow smoothly. Now it has reached to such a point that it is not only providing the footwear to the domestic market but its presence is felt in Global markets also. If you talk about shoes then the name of Agra automatically follows due to shape and size of numerous shoe industries in the place. The following factors that are skilled labours, traditional industry, artisans and availability of raw materials made the shoe industry prosper in Agra. It is a known fact that if skilled labour and raw material is available in the place, then the industry grows with leaps and grounds.

(a) Availability of Shoe Last

The shoe last is the vital equipment for manufacturing of shoes. Without the help of the last the shoe cannot be manufactured in true shapes and sizes. Luckily in Agra 80 to 100 traditional wooden shoe last manufacturing units are present and granting the manufacture of shoe industry. Since the wooden shoe lasts are cheap as compared to plastic shoe lasts hence the domestic market depends mostly on these shoe lasts while PVC lasts are quality oriented hence they are used by the exporters as well as large domestic shoe manufacturing units which are producing good quality of shoes.

(b) Availability of Footwear Designers

In Agra the designers cum pattern cutters are available on demand. The units which are manufacturing up to 150 pairs of shoes per day, they cannot afford the services of the shoes designer cum pattern cutters on regular basis (since shoe industry is a seasonal industry), hence the services of these designer cum pattern cutters cum handy to them on job work basis. This gives them the margin of lower production cost. In comparison they have engaged the designer cum pattern cutters on regular basis.

(c) Footwear Components

Since various components of shoe industry are readily available in the market like soles, insoles, heels, shanks, hence the shoe manufactures are in a good position to cut various labour cost and unnecessary labour problem. The footwear manufacturer has to just purchase these components from open market and assemble the shoes in his units as per customer design and specifications.

(d) Tools, Equipments and Machinery

The low cast tools, equipments and machinery which are readily available in the open market serve as a booster to the shoe manufacturing units of Agra which are producing the shoes in very reasonable costs compared to other places.

(e) The Raw Materials

The raw materials like leather and synthetic materials are easily available in the market. The industries can purchase these raw materials at very short notice and do not have to maintain the inventory. The grinderies materials like laces, adhesives, etc. are manufactured in Agra itself. Hence the shoe industries have flourished in Agra like anything.

2.3. Types of Footwear made in the Cluster

In Uttar Pradesh the footwear industry is mainly concentrated in Agra and Kanpur, but Agra is one of the largest manufacturers of footwear for domestic as well as international markets. The product manufactured in Agra can be classified under the following categories:-

Footwear manufactured in Agra

S.N.	Types of products	Upper Materials	Bottom Materials	Customer	Types of the Units
1.	Infant shoes Children Shoes	Synthetic upper materials, Leather waist pieces	MCR sheet, PVC unit soles	Domestic market	House hold units/ House hold workshop
2.	Chappals & Sandals	Same as above	MCR sheet, PVC & TPR unit soles	Domestic market	House hold units/ House hold workshop
3.	Sports Shoes	Synthetic upper materials, Leather & waist pieces	MCR sheet, PVC & TPR unit soles	Domestic market	House hold units/house hold workshop

4.	Industrial / Military Shoes and Boots	Chrome upper leather	Sole leather, MCR, PVC & Pu unit soles	Industrial workers, NCC and military establishment	Semi mechanised workshop
5.1	Shoes and Boots	Leather upper	Sole leather, TPR & PV unit sole	Export market	Semi mechanised workshop
5.2	Shoes and Boots	90% of synthetic uppers & 10% of leather uppers	PVC, TPR, PU and air mixed soles	Domestic market	House hold /Semi mechanized workshop
6.1	Shoe uppers	Leather waist & synthetic materials	-----	Domestic market	House hold units
6.2	Shoe uppers	Leather uppers	-----	Export market	Semi mechanised / mechanised workshop

2.4. Work Force (Employments)

In Agra the footwear workers are predominantly Jatavs and some poor section of the Muslim community are involved in the footwear making. According to the estimated data around 60,000 skilled workers employed is around 5000 mostly cottage (home base) small scale units, producing about 90 million pairs of shoes and 110 million pairs of sandals and chappals annually.

In short, production workers in house hold enterprises and workshop are Jatavs and some times Muslims. In non – productive jobs in larger workshops and modern small scale factories, such as quality control, packing and administration, hardly any Jatavs work. In the larger and more modern factories there is a trend of decreasing employment for Jatavs also in production. The entrepreneurs of many units prefer non-Jatavs men and women's.

Estimates of Employment in Footwear Cluster in Agra

S.N.	Types of Production Units	No. of Units	Employment (Direct)
1.	House hold units	3000	15,000
2.	House hold workshop	1250	10,000

3.	Non-house hold workshop	500	10,000
4.	Semi-mechanised workshop	200	20,000
5.	Mechanised factories	50	15,000
6.	Workers in ancillary units	-----	18,000
7.	Women job workers	-----	10,000
8.	Factory workers (women)	-----	2,000
	Total	5000	1,00,000

About 25% of the total population of Agra directly or indirectly earned their lively hood from this sector.

2.5. Concentration of Footwear Units in Agra

The production unit in Agra highly concentrated in 50 localities spread in ten major areas. Apart from these concentrated areas, the production units are also spread in different areas of the city with less concentration. The localities having the concentration of production units in Agra city are shown as follows:-

S.N.	Name of the major area	Name of Mohallas
1.	Sadar Bhalti	Doli Kar, Ghatia Mannu Bhanja, Nala Mantola, Teela Nandram and Mantola
2.	Nai Ki Mandi	Kattara Nail, Chota Galivpura, Haveli-Ka-Berka, Choti Adoye.
3.	Shahganj	Prakash Nagar, Prem Nagar, Rui Ki Mandi, Bharakambha, Bhogipura, Prithwinath & Namak ki Mandi
4.	Lohamandi	Jagdishpura, Gadi Badoria, Madiyakatra
5.	Taliya	Nala Kajipara, Kethwali Basti, Chakkipat
6.	Agra Cononment	Nandpura, Nayi Basti, Pakkisarai
7.	Collectorate	Sunderpara, Idgah
8.	Agra Matura Road (Bye-Pass)	Khandari, Sheetla Road, Sikandra, Artoni

There are some other places / localities in Agra like Ratanpura, Chidda ka Nangla, Lal Masjid, Etma-dola, Tajganj, Dhanoli, Nandipura etc. where as these units are concentrated.

Production of Footwear

With an estimated number of 5000 units employing about one Lack workers (including the surroundings) the annual shoe production in Agra accounts for 120 million pairs, about 9 million pairs of chappals and sandals. Further, the shoe industry in Agra produced sizeable quantity of shoe uppers for exports. The home based units of Agra (artisans) also produce sub standard shoe uppers by using shoe waist / cut pieces and selling through Haat (open market in chakkipet). These uppers are purchased by the cobbler (artisans) from UP and neighboring states like Rajasthan, Haryana, Punjab, MP and producing the low quality of shoes in their shops.

The highly labour intensive operations of the mechanised sector are more often sub contracted to home based women workers. These typical production operations of labour in Agra indicate the strong linkage between the organized and decentralized sector.

2.6. Types of Production Units

The production units in Agra can be classified into eight categories depending upon the types of labour used, size of the unit, Technology adopted, place of work and the market they sell their shoes.

(a) House Hold Unit

These units have work places in and around the house and use only family labour and traditional skills. The kinds of units are being run by undivided joint families or big families as they have sufficient skilled workers each to work on specialized operations of shoe fabrication.

(b) House hold Workshops

These units besides primarily depending on family labour do engage one or two hired workers for certain specific operations (single worker can not attend to all operations). Such of these workers who work as hired workers in house hold units work in three to four such units in a day because of low scales of production in them.

(c) House Hold Workers employing less than 10 workers

Engaging 5 to 10 workers on piece rate basis, these workshops are quipped with necessary machines like:-sewing, buffing, stuck on press with Air Compress, Heat activator.

(d) Non-House Hold Workshop

This class of units in Agra employs more than 10 workers and wages are paid on piece rate basis on week ends. The tools, machines, raw materials are provided by the proprietors. Such units undertake orders, supplying Local traders of Hing Ki Mandi and outside of Agra.

(e) Shoe Units Specialized in Industrial (Safety) NCC Shoes

These types of units in Agra are Semi Mechanised units and manufacture heavy types of all leather Shoes/Boots meant for Defense, NCC, Mining, Private and Public Limited Companies.

(f) Semi Mechanised Factories

These units each engaging “between” 50 to 200 workers manufacture full shoes / shoe uppers for exports. The workers involved in such factories are not regular. The workers of these factories are being brought by the contractors. The contractors play a vital role as middle men in bringing the workers to the factory and in disbursing the wages on piece rate basis at every week after collecting from the proprietors / owners.

(g) Mechanised Factories

These units are mechanised and conveyors type / assembly line of production is organised by keeping series of workers each to attend to a specific job in the production line. Hence 70% of the workers are skilled and rest work as apprentice. In such factories, women are also involved in certain operations.

(h) Job Work Units

The mechanised shoe making units are having a system of organising large scale production, with less investment and overheads. After the cut components are made in the factory, they are sent to small workshops for assembling on job work basis. These small workshops engaging labour on piece rate basis for assembled uppers. These finished uppers are inspected and wages are paid on piece rate basis to the job work unit.

2.7. Core Cluster Actors

(a) Central Footwear Training Institute (CFTI) - Agra

Central Footwear Training Institute Agra is the oldest institute, established in 1963, previously it was known as Central Footwear Training Centre. Now from 1.1.1996 working it has become an Autonomous Body under Ministry of Small Scale Industry.

This Institute conducts two years Diploma Courses in Footwear Design and Production Technology in collaboration with Textile Institute, UK, and one year certificate course in Footwear Design and Product Development. This Institute also conducts various types of short term courses and skill development programs. This Institute is also providing Computerised Pattern Grading, Mould Making Services to the Footwear Industry.

(b) Government Leather Institute (GLI)-Agra

Government Leather Institute, Agra is also old Institute established in the year 1962 run by Technical Board of Education Government of Uttar Pradesh .This Institute is conducting three year Diploma course on “Leather Technology” and footwear & Leather goods manufacturing approved by all India Board of Technical education.

This Institute has the facility of Physical/ Chemical Testing lab and previously they were providing the testing facility to the industry.

(c) Dayal Bagh Leather Working School- Agra

This institute is the oldest institute of Agra established in the year 1930 and run by the (Private) under Radha Swamy Society, Agra conducting two year Advance Certificate course in Footwear & miscellaneous. The financial assistance is provided by the Samaj Kalyan Kendra U.P.

(d) AADHAR

‘AADHAR’ is a Private society registered under the rule 21 of the Societies Registration Act of 1860. It is being managed with the expertise of the professionals / Technologists. Performing Arts, shoe and carpet designing and manufacturing. This is a platform of people which develop and upgrade the skills of artisans, youths, craftsmen through different training program.

(e) Bharteeya Charm Udyog Sangh

Bharteeya Charm Udyog Sandh a registered institute of the Khadi and village Industries Commission was established in early 1970s. This institute was under the direct control of KVIC until 1992, and from then on was managed by the society itself. This institute is also providing marketing assistance and upgrading the skill of artisans by imparting the training programs.

(f) Central Leather Research Institute (CLRI)

Central Leather Research Institute (CLRI) a constituent laboratory under the council of National Scientific and Industrial Research (CSIR) New Delhi is the worlds largest R&D Institute in leather sector. CLRI is among a few research laboratories in the world having strong Academy-Research-Industry Partnership.

CLRI has developed a number of technologies in the areas of leather, chemicals, leather processing, waste water treatment, Tannery and slaughter houses, BY-products utilisation and commercialisation. CLRI in association with Anna University conducts courses in leather technology and footwear science and engineering, leading to B.Tech and M.Tech degrees. A center of high learning and research leading to doctoral programs of various universities, CLRI also offers a number of short-term and long-term vocational training programs in leather processing and leather product manufacturing.

(g) Footwear Design and Development Institute (FDDI), Noida

Footwear Design and Development Institute (FDDI), Noida is the leading Institute in India for the Footwear Industry and Human Resource Development, FDDI is a society registered under the society Act 1860, sponsored by the Ministry of Commerce Govt. of India in 1986. Today the institute has attained international recognition and is serving the Footwear Industries across India. This institute is organizing long term an short term training courses according to need of the Industries and providing the physical and chemical testing services to the Industries.

(h) National Institute of Fashion Technology (NIFT)

National Institute of Fashion Technology set up under the algis of the Ministry of Textiles, Government of India, in the year 1986. NIFT is

acknowledged as the premier institute of fashion design, management and technology across the country and is providing training to the young and creative minds and is organizing fashion shows in different parts of the country.

(i) Council for Leather Exports (CLE)

The Council for Leather Exports (CLE), as export promotion organization functioning under the Ministry of Commerce and Industry, Govt. of India, is the apex body of the professionals and is rapidly growing in Indian Leather Industry having its Head office in Chennai & Regional offices at New Delhi, Mumbai, Kolkatta, Kanpur and an Extension office at Agra. CLE has been playing an active role in the overall development of the leather sector, including infrastructure development, market development and export promotion, market research etc. The CLE serves as bridge between Indian exporters and overseas buyers.

2.8. Other Cluster Actors

(a) Agra Footwear Manufacturers Exporters Chamber (AFMEC)

Agra Footwear Manufacturers Exporters Chamber (AFMEC), registered under the Indian societies Act is dedicated for the advancement of the Agra footwear industry in general and it's administered by a body of its elected members.

The members of this association are mostly from SSI sector having, mechanised / semi mechanised workshops that are enjoyed in export activities.

(b) Boot Manufacturers Association, Agra

The boot manufacturing association is a group of 20 to 25 members who are looking the interest of boot manufacturers which are supplied to defence, industrial workers of the industries, police, and etc.They mainly watch the interest of the boot manufacturers.

(c) District Industries Centre

District Industries Centre was established with the intention to promote the growth of small scale industries in the cluster. The centre provides SSI

registration, which is very much helpful while dealing with banks and other Govt. departments. Some of its objectives are as follows:-

- . Providing financial assistance under pradhan Mantri Rozgar Yojna (up to Rs 2 lack) through nationalized Bank to unemployed youth.
- . Keeping updated record of SSI in Agra.
- . Providing information to government as per requirement.
- . Keeping complete statistical information / data on small scale industries.
- . Implementing industrial policies of the government.
- . Providing subsidies as per government rule.
- . Promoting ISO certification.

(d) National Small Industries Corporation Limited (NSIC)

NSIC, as ISO 9001 – 2000 company, since its establishment in 1995, has been working to fulfill its mission of promoting, aiding and fastening the growth of small scale industries and industry related small scale services business enterprises in the country. NSIC's main trust is on providing technology up gradation, marketing and finance support services to the SSI sector and facilitating International Business Partnerships in the small scale sector under the changed scenario to enable the small scale industries to gain comparative advantage and to contribute effectively to the development of the economy. NSIC has restricted its activities recently to meet the twin challenges of growth and competition in the small scale industries.

(e) Uttar Pradesh Financial Corporation (UPPC)

Uttar Pradesh Financial Corporation (UPPC) provides financial assistance to new / existing units going in for acquisition of fixed assets such as land, building, plant and machinery etc.

(f) Uttar Pradesh State Industrial Development Corporation (UPSIDC)

Uttar Pradesh State Industrial Development Corporation (UPSIDC) is a under government of UP whose job is to develop the industrial plots and to provide it to industry.

(g) Pollution Control Board (office), Agra

The UP Pollution Central Board is a premier body of the government of Uttar Pradesh engaged in establishing and implementing policies related to the environment as far as they are concerned to small, medium and large scale industries. The major areas of working are standardization of the

technical specifications for air, noise and water pollution and control monitoring of pollution levels in the industry. It is also coordinated with industrial associations in order to establish plans to minimize the level of pollution created in the industries. Implementation of any other directives related to the pollution from the government of UP also done by the Board.

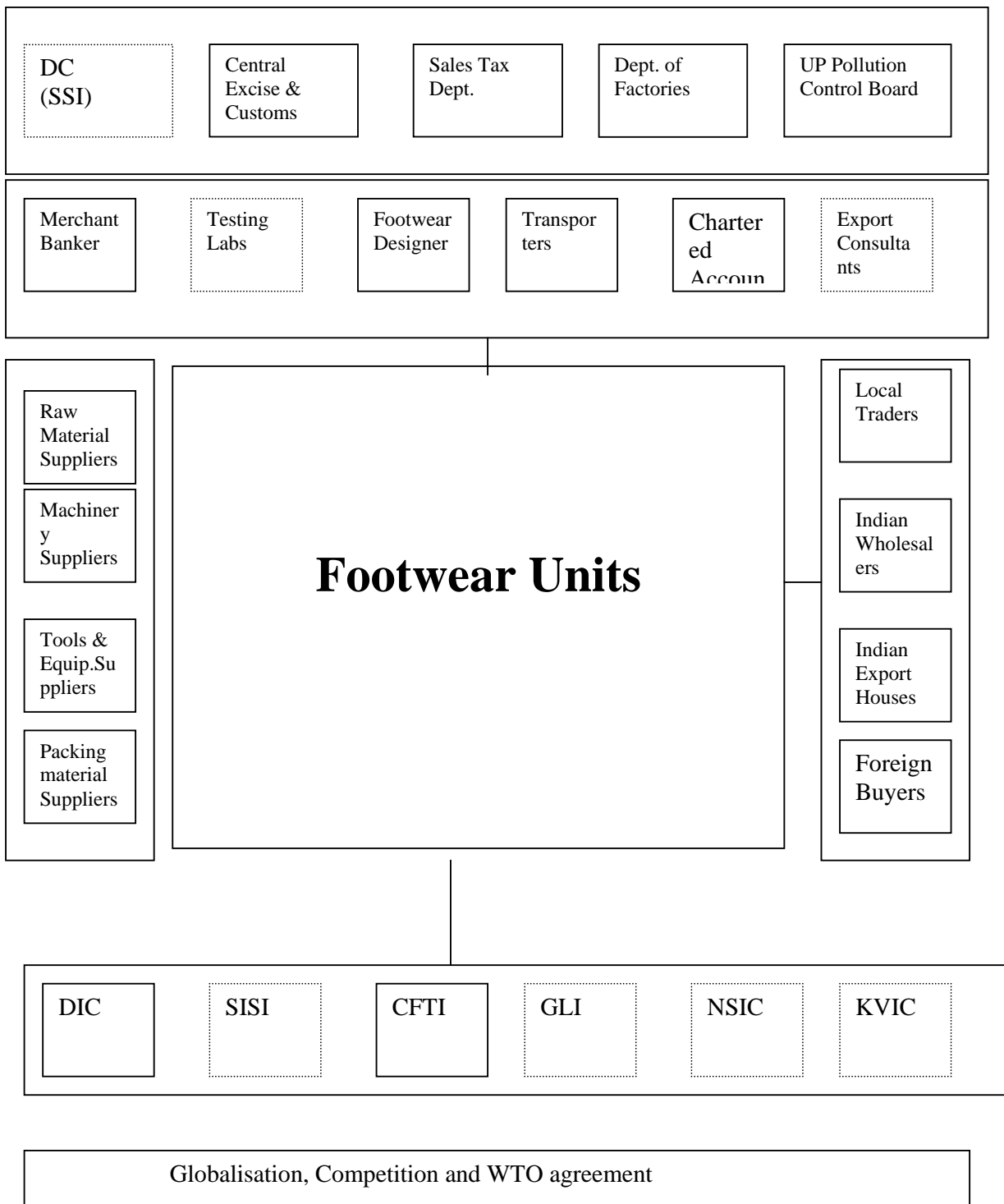
(h) Small Industry Services Institute (SISI) Agra

SISI, Agra is a part of national network under the aegis of Small Industries development Organization. Which is an apex body administered by the ministry of Small Scale Industries, additional secretary & development Commissioner (SSI) network. This Institute is engaged in various types of promotional activity for the SSI sector. The major activity of this Institute includes technical assistance to SSI units, coordinating various training and awareness programmes, preparing project reports etc.

(i) Financial Institutions and Banks

This actor constitutes sub-actor such as development cooperation likes UPFCI and nationalised commercial Banks and private commercial Banks also comprise this actor. Their existence is closely linked mostly to mechanised Industry.

2.9. Present Cluster Map



3. THE FOOTWEAR

The purpose of the footwear

The Footwear is a product which protects the human foot against injuries, the adverse weather influences, dirtiness and which performs the utility and aesthetic function.

A. The basic types of footwear

The basic types of footwear are divided into two categories (groups).

I. Open Footwear

The chappals, sandals, slippers fall under this category.

II. Closed Footwear

The shoes, boots, semi-leg boots and leg boots which cover the entire foot are known as closed footwear.

Fig.1—Basic Footwear Names

B. Main parts of footwear

The footwear can be manufactured by a number of parts and components but it can be a monolithic one, but every time we can differentiate these functions into two parts:-

- I. Shoe uppers (upper parts and components).
- II. Shoe bottoms (bottom parts and components).

Fig.2—Shoe parts Upper and Bottom

C. The Shoe Last

Shoe lasts are fundamental to shoe manufacturing since they dictate the exact shape, size and fitting of the shoes made out of them. Last design depends on fashion, trends as well as anatomy of human foot.

Traditionally, last were made from wood, now they are not suited for modern shoe production. In countries with warm climates and high humidity, wooden lasts react to the effects of the weather-they shrink. Imprecise lasts cause problems in shoe production and result in complaints about poor fitting at the point of sale. Wooden lasts have been replaced by plastic lasts. The plastic used is a high density Polyethylene in powder foam. The metal usually an aluminum alloy is also used for the manufacturing of the shoe last.

There are three main types of lasts from the construction point of view. They are commonly used for hand and machine shoe making.

1. The Solid Black Last

Chiefly used for making of chappals and sandals.

II. The Scoop Black Last With Cut Wedge

These lasts mostly used by the hand made footwear industry.

III. Hinged Last

These last are mostly manufactured in PVC material and exclusively used by machine made footwear industry as well as by some hand made shoe industry which is producing the good quality of the footwear.

Fig.3—Different types of Last

D. Shoe Length and Sizing Systems

Shoe lengths are measured and designated according to the French “Paris stitch” or the English size. Only a few Eastern European countries have introduced the metric-based “Mondopoint”, system to designate shoe sizes for the local market. In spite of the international organization for

standardization's recommendation that the system be introduced in the footwear industry, this size classification has not been able to establish itself in Western Europe.

Altogether, five different sizing systems are used for shoe lengths:-

1. The French "Paris stitch" system
2. The English "size" system
3. The American sizing system
4. The Japanese system
5. The metric system as the basis of the "Mondopoint"

I. French "Paris stitch" system

This measure of length for shoes was created when it became apparent that the centimeter gradation from size to size was too imprecise. Two centimeters was divided into three equal parts of 6.666 mm each, and the resulting unit of measurement was called the "Paris stitch". The stitch tape measure begins at 15 stitches (=10 centimeters) and ends at 50 (=33.33 centimeters).

II. English "size" system

Great Britain was the first country to develop its own sizing system for shoes. It is based on the English units of measurement "foot" and "inch". 1 foot consists of 12 inches and is equal to 30.5 cm. 1 inch (25.4 mm) is equal to 3 sizes. 1 size = to 1/3 inch = 8.46 mm is the graduation from one full size to the next. It was not until later that the inch was divided into 6 parts of 4.23 mm and half sizes for English shoes were introduced, which enabled a better fit.

III. American Sizing System

The United States adopted the English sizing system with one difference. It began measuring at 3 11/12 inches (9.94 cm) instead of 4 inches (10.16 cm). In addition, American women's shoes differ by 1 1/2 sizes and American men's by one size from the English sizes.

IV. Japanese System

Japan has different shoe lengths and fewer sizes than any of the other systems. Japanese men's shoe sizes start at 24 (equivalent to French size 39) end at 30 (French size 48), and women's sizes start at 22 (French 35) and end at 28 (French 43).

V. Metric System

Shoe size classification in cm is based on the principle that shoe length is equal to foot length plus 10 mm. The graduation between sizes is 5 mm for half – sizes and 10 mm for full- sizes. The as yet not very widespread Mondopoint system is based on the measurements of an average foot

wearing a sock and on weight – bearing. The size classifications consist of the numbers, such as 240/ 95. The first figure is the size, i.e. foot length in mm. The second figure is the width code, i.e. ball girth expressed as a percentage of foot length. For example: shoe size classification 240/95. This shoe will fit a foot that is 250 mm long. The ball girth is 95% of 240 mm, or 228 millimeters.

Categorisation of Sizes

Category	Size Series (English sizes)	Size Series (Paris point)
Infants	0-6	15-23
Children	7-10	24-28
Boys & Girls	11-1	29-33
Maids & Youths	2-5	34-38
Ladies	2-8	34-42
Men	6-11	39-46

VI. Normal Grading of Lasts

Grading of English Sizes:

Increment in length	8.46 mm between whole sizes
Increment in Joint Girth	6.35 mm between whole sizes
Increment in Joint Girth	6.35 mm between fittings
(Up to size 10 children's:	5.00 mm between fittings

The tread is usually $\frac{1}{3}^{\text{rd}}$ of the joint girth, and the seat width is approximately $\frac{1}{4}$ of the joint girth.

Grading of Paris Sizes

Increment in Length	6.66 mm between whole sizes
Increment in Joint Girth	5.0 mm between whole sizes
(Children's 26-30 sizes)	4.0 mm between whole sizes
Increment in Joint Girth	5.0 mm between fittings

Grading of Mondopoint sizes

Increment in Length	5 or 7.5 mm between sizes.
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Increment in joint width (not joint girth) depends on the individual manufacturer's grading decisions but it is likely that with 5 mm sizes the width increment between sizes will be 2 mm and with 7.5 mm sizes the width increment between sizes will be 3 mm.

Increment in joint width between fittings will likely be 3 mm.

3.1. Footwear Components

During the first half of last century, shoe makers in shoe factories manufactured all the components needed for their shoes themselves. The components were then shaped on imprecise wooden lasts and applied to the shoes or manipulated as a part of the shoe during the subsequent production process. The shoes are made of the following components:-

1. Uppers
2. Insole
3. Box Toe (Toe Puff)
4. Counters (Stiffener)
5. Out Sole (Unit Sloe)
6. Heels and Top Lifts

1. Uppers

The manufacture of shoe uppers was intensive and requires almost three quarters of the manufacturing time allotted for the entire shoe. For each stitching process, sewing machine factories developed special machines or additional attachments for stitching the upper leather, lining leather and thread used. So that the upper, lining and reinforcement components are stitched for making the shoe uppers.

Due to the disproportionate amount of work required for shoe uppers, bottle necks often occur in the closing room, which cannot always be eliminated by increasing the workers machinery output. So shoe industries in industrialised countries solve this problem by purchasing uppers from factories in developed countries with low labor cost. In India, especially Agra shoe exporters are giving job work to the cottage / SSI units for manufacturing the uppers.

Fig. 4 – Assembled Upper

2. Insole

The Insole is one of the most important prefabricated shoe components and requires last conformity, Shank stability, and a high degree of precision during assembly. The Insole is inner sole of the shoe. It is next to the foot under the socks. This Insole is really the foundation of a shoe and it can be made in two ways; one piece Insole and other two pieces Insole.

The two pieces Insole (known as blended Insole) is made with a flexible forepart and a rigid backer including a steel shank to strengthen the waist of the shoe. The combination of backer and the Insole not only maintain rigidity in the waist but also provide secure hold to the heel attaching pins/nails at the seat.

Fig. 5– Molded Insole (Texon)

3. Box Toe (Toe- Puff)

It is the stiffening element which is inserted between the upper and lining at the toe of a shoe upper. A good Box Toe (Toe Puff) maintains the shape of the last after the last slipping, reinforces the forepart of the shoe, maintains its shape even during wear, and protects the toe injury in special purpose footwear.

Fig. 6– Synthetic Toe-Puff (Box Toe)

4. Counters (Stiffener)

The function of the counter is to maintain back part shape of the shoe in order to ensure fit and preserve the shape of the shoe during wear. It is inserted between the upper and lining at the back of the shoe upper. The counters are made from the V.T Leather (sole leather), Leather Board Sheets, Polystyrene counter materials, Thermoplastic counter materials and Polystyrene Plastic counter.

Fig. 7--- Molded Counter (Stiffener)

5. Outer Soles (Unit Sole)

The outer sole is the layer material that covers the bottom of the shoe providing the walking surface. In Traditional Shoe making, out sole were die cut / manual cut with a trimming allowance from sole leather or rubber sheets, cemented, stitched or in the case of wood – pegged shoes nailed to the lasted shoe. Then the edge was finished.

Many changes occurred in the 1950's, wooden lasts replaced with better resilient metal or plastic lasts and new raw materials such as Polyvinyl chloride (PVC), Polyurethane (PU/ PUR) and thermoplastic Rubber (TR/TPR) were introduced in the footwear industry for direct out sole molding and manufacturing the Unit Out Soles.

Fig. 8—Outer Sole

6. Heels and Top lifts

The heel is the under part or in some case outer part of the bottom which supports the heel of the foot of the person wearing the shoes. Wood formerle an important material for women's heels has been replaced in heel production by plastics, in particular polystyrene and polypropylene or polyurethane foam. Heels must conform to the last and be constructed to fulfill both aesthetic and anatomic functions. Men, Children and law Women's heels are made of sole leathers, composition sheets or molded or cast from plastics. Heels are shaped to conform to lasts with the fashionable collections available today, heel are a determining factor in Shoe styles, A very important part of a top- lift which is made of abrasion- resistant materials. Polyurethane top lifts have become standard for women's heels with small surfaces in contact with the ground.

Fig. 9-- Different types of Heels

3.2. The Footwear Materials

For shoe manufacturing a large assortment of various materials is technically important according to their use. These arterials can be classified, As the new invention takes place in the Footwear Industry and lot of new materials have come up for manufacturing the good quality of footwear as main materials .The lot of ancillary unit has started to manufacture the footwear components.

The classification of shoe materials can be explained accordingly as per the components.

1. Upper materials
2. Lining materials
3. Reinforcement materials
4. Toe Cap (Box Toe) materials
5. Counter (Stiffener) materials
6. Insole materials
7. Out Sole (Unit Sole) materials

- 8. Grinders
- 9. Auxiliary materials (Adhesive, Finishing)

I. Upper Materials

For manufacturing of shoe uppers, the natural Leather, Paramedics, Leather Fabrics, Textile materials, Plastic and rubber fall are used; but the natural Leathers are the most important materials which are superior in their characteristics to all other materials. When evaluating shoe making materials using 1.3 scales, the position of leather is evident from the following table:-

Materials	Strength	Water Proof ness	Air Permeability	Suction Capacity	Total
Leather	2	2	2	2	8
Textile	1	0	3	3	7
Rubber	3	3	0	0	6
Plastics	3	3	0	0	6

Among main characteristics appreciated by the consumers there are strength, air permeability, suction capacity and water proof ness. The natural leather due to its characteristics is the favorite material for shoe and till today no other material can be substituted for it as per quality.

II. Lining Materials

The basic materials for footwear lining are Leathers, Textiles, Synthetic materials which are mostly used by the manufactures for making the shoes lining.

III. Reinforcement Materials

The basic upper materials do not have the characteristics necessary for the required quality which concerns mainly the thickness, Softness, Strength, Servility, Dimensional stability. For enforcing the required characteristics, the basic materials like sugar coated clothes, textiles, tapes etc are backed upon the whole surface or on definite spots where to reinforce the given property. Which are to improve the quality of the upper materials?

IV. Grinders

There are some other materials which are also used lay the shoe manufactures for making the footwear they are known as shoe laces,Threads,Tapes, Metal fittings, eyelets, Buckles, Different types of Nails/Tingles, Shanks, Rivets, Hooks Zip fastener.

V. Soling Materials

Previously the shoe manufactures were using Rubber sheet and V.T. Leather as soling materials, but after invention of new technology in the year 1950 therefore some other materials, are introduced like EVA, PVC, PU, TPR, cheap which are found more suitable as soling Materials and easy to manufactures.

VI. Insole Materials

Traditionally shoe making up to 1950, sole leather or split leather were used as an insole material. After invention of new technology the leather Board, Texon, Bontex and other cellulose Board and some special types of shoe construction textiles are used as Insole materials. The exporters for maintaining the quality and mass production of shoe manufacturing using molded insole.

VII. Counter Materials

The basic counter materials which are used in shoe industry are made from Sole Leather, Leather Board Sheets, Polystyrene Counter materials, Thermoplastic Counter materials, Polyethylene Plastic.

VIII. Toe Cap (Box Toe) Materials

The materials which are used for toe-cap are made from sole leather; Leather board sheet Solvent activated polystyrene, materials impregnated with Latex, Rubber and thermoplastics, Fabrics impregnated with thermoplastics.

IX. Auxiliary Materials

The adhesives which are generally used are solvent, dispersion, hot melt adhesive are used for joining/sticking the shoe components for sturdy fastness. The finishing chemicals like Latex, polish, etc. are also used for giving shining to the shoes.

3.3. Tools, Equipments used in footwear industry

In footwear industry in Agra the artisans of the House hold units, House hold workshops use the old hand tools like awl, Rampi, hammer, pincer, wooden last, number sets, Khurpi, cutting knives, nail pullers, scissors, fitter's hammer, marble stone, revolving punch, eyelet setter, sharpening stone, embossing and stamping tools and three leg iron last. However during the recent years these informal Units have started using improved tools like Designing knife, Punching sets, Screen printing tools etc.

The semi mechanised and mechanised workshop using all latest developed tools like Seam Rubbing tools, Cement containers and PVC shoe lasts for manufacturing of good quality of the footwear. The advantage of these tools

is that they are easy to handle, reduce physical strain, improve the quality of fitting and enhance production.

Fig.10--- Different types of hand tool

3.4. Machinery

The machinery used in the footwear units by the enterprises in Agra can be classified according to the scale of production, site of employment, level of technology used, the place of work and the market they cater to:-

(a) House Hold Units

The house hold units where family labour is working, mostly hand tools are used because they are purchasing the closed uppers from the local (Hat) market which is sale the uppers every Monday and Friday.

(b) House Hold Workshops

These work shops are using stitching machines, stamping machines, stuck-on press, air compressor, ruffling machines, and heat activator for manufacturing the footwear for domestic market.

(c) Semi – Mechanized Workshop

These workshops are using flat, post & cylinder Bed sewing machines, zigzag sewing machines, stamping and embossing machines, Lace cutting machines, punching and eyeleting machines, stock on press, Air compressor, roughening machines, finishing machines, heat activator, heat seating chamber for manufacturing the shoes.

(d) Mechanised Workshops

These workshops are fully mechanised and using all latest machinery especially in lasting and making departments. Most of these machines are imported .Theses machines are as follows:-

1. Stitching Machine (Flat, post and cylinder bed)
2. Laminating machine
3. Stamping and embossing machine
4. Upper edge skiving machine
5. Punching and eyeleting machine
6. Counter Molding machines

7. Toe puff fussing machine
8. Mulling chamber (upper setting machine)
9. Seat and side lasting machine
10. Heat setter
11. Pounding machine
12. Wrinkle chasing machine
13. Hot air ironing machine
14. Roughening machine
15. Heat activator
16. Sole pressing machine (stuck on press)
17. Heal nailing machine
18. Drying and Heat setting apparatus
19. Delasting machine
20. Finishing machine

The mostly mechanised workshop is also using the conveyer in closing department and lasting department for transporting the goods. Some industries are using trolley (Racks) system for transporting the goods. There are some mechanised units which are also using DMS, DIP machines for direct

3.5. Process of Shoe Manufacturing (Cemented Construction)

I. Product Development

The development is the process of designing new styles of shoes or adapting existing or previous ones and then specifying the materials and components, detailing the materials and processes to be followed in order that the styles of shoes can be produced in bulk and then satisfies the needs of consumer when purchased.

II. Designing and Pattern Cutting

According to the samples of shoes, design or requirement of the customer the model last is selected by the shoe designers then patterns are developed and sample shoe is manufactured in the sampling room under the supervision of the shoe designer by the craftsmen/artisan. When the samples are approved by the buyer/customer the patterns are graded by hand or machines in required sizes and handed over to the production division for manufacturing the shoes. The designers also specify the materials required for making the shoes.

III. Clicking/ Components Division

The components are clicked by hand or machine by the clicker then checked and marked by hand or by stamping machine. The upper and lining components are skived according to the manufacturing process. The

reinforcement materials as per requirement/design are also attached with upper components.

IV. Upper Closing

The upper components which are skived are folded by hand, punched and perforated if required then temporarily attached and permanently stitched. The Lining components are also attached with the uppers then Eyelets/Elastic/Buckles etc. are fitted as per design and excess Lining material is trimmed on top edge of the quarters then upper are cleaned and checked by the superior. The uppers are ready for lasting next operation.

V. Lasting, Making and Finishing

Lasting in the shoe making is to pull the upper over the last. The Toe puffs and stiffeners are fitted between upper and lining, and then mulling operation is done to soften the uppers. Then upper is lasted on insole which was fitted on Bottom side of the last. The lasting margin of the upper is cemented by using adhesive and ruffling is done on lasted margin by ruffling machines. If the synthetic materials are used then chemicals are used for ruffling the lasted margin. The gaps between lasted upper and insole are filled by using bottom filling materials then steel shank is attached. The unit soles are attached with the help of adhesive then press on stuck on press for permanent sticking. For drying the shoes, they are kept in the Heat Seating chamber for removing the moisture from shoes. Then delasting is done. At last shoes are cleaned and finished, checked by the supervisor/inspector.

VI. Packing

The shoe lift is inserted in the shoes to maintain the shape of the finished shoes. After this operation the finished shoes are kept in the boxes.

3.5.1. Technology Process of the Shoe Bottom Assembly

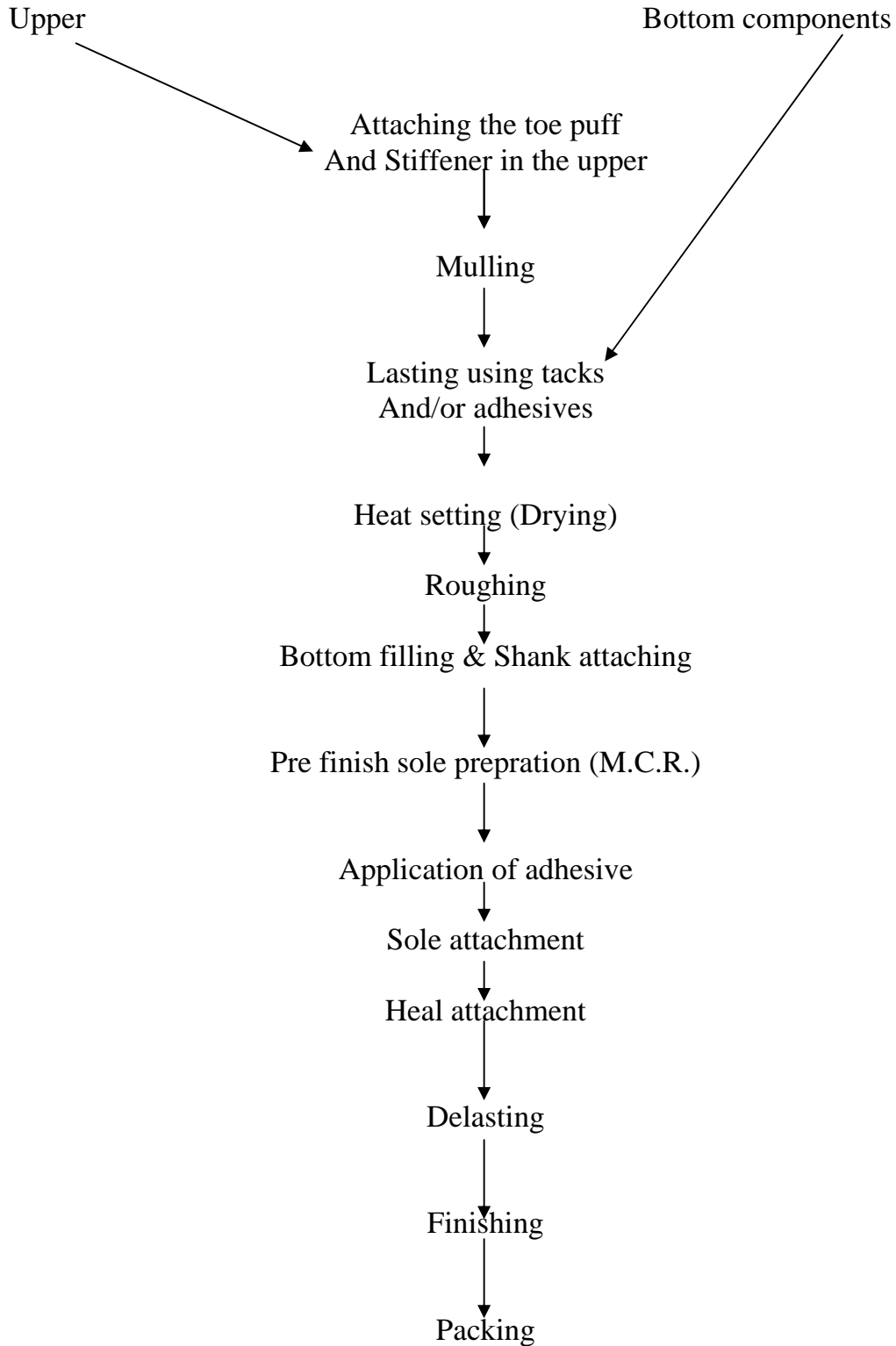
The shoe Bottom assembly is one of the decisive activities which considerably influence upon the footwear quality. The technological aspect of the shoe bottom assembly is conditioned by the shoe type. There are number of way in which footwear can be made. Each particular method is known method of construction and in each case will consist of a particular sequence of lasting operations allied to a specific method of sole attachment.

Shoe Construction

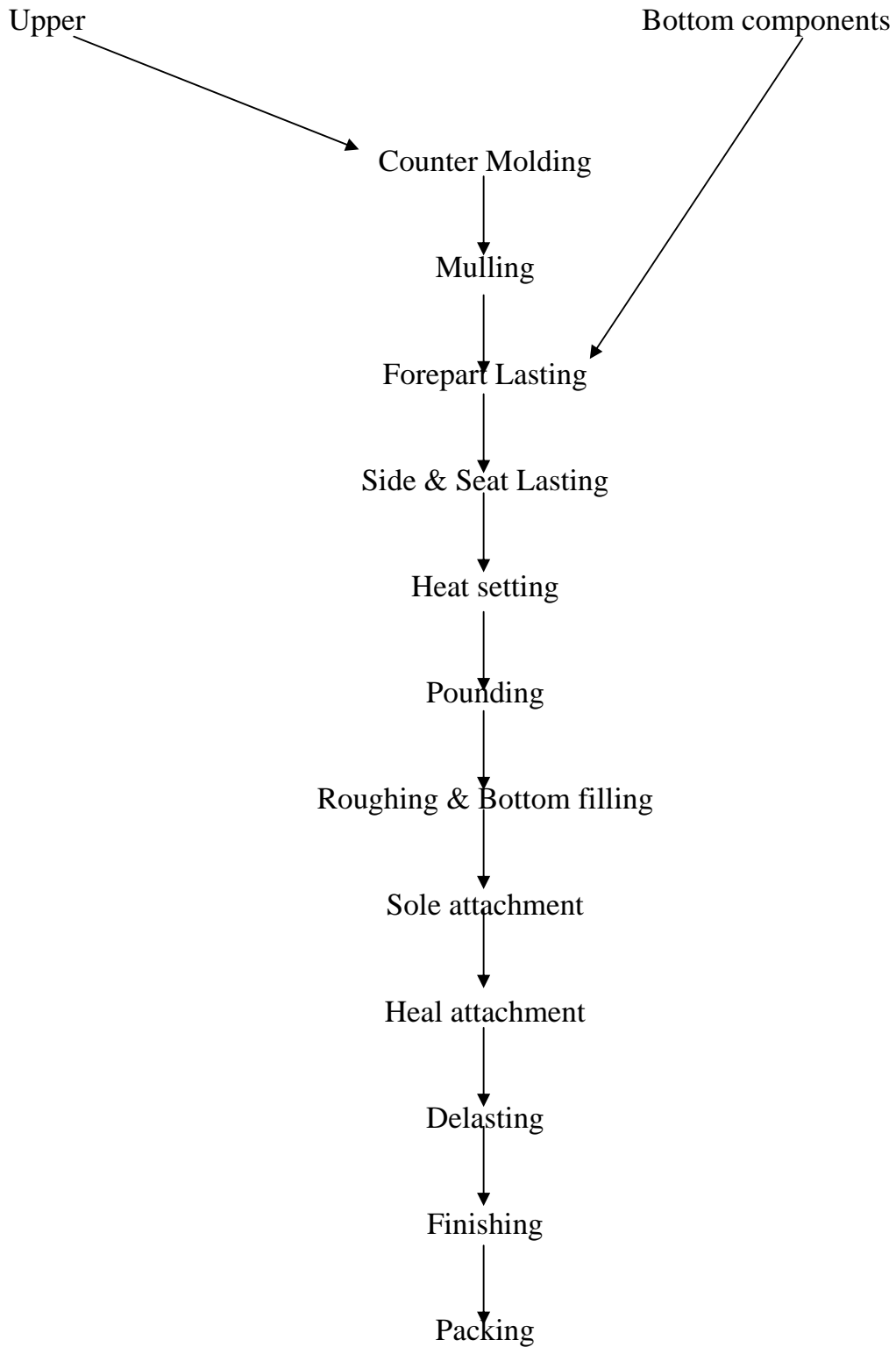
In India, specially in Agra the most of the most of the footwear manufactures are using Stuck on Construction (Cemented) for manufacturing the footwear. There are some other methods of Shoe Construction like Direct Vulcanised (DMS), Direct Injection Moulding, and Goodyear Welted etc which are also used by the footwear manufactures

3.6. Process Flow Chart (Method of Construction)

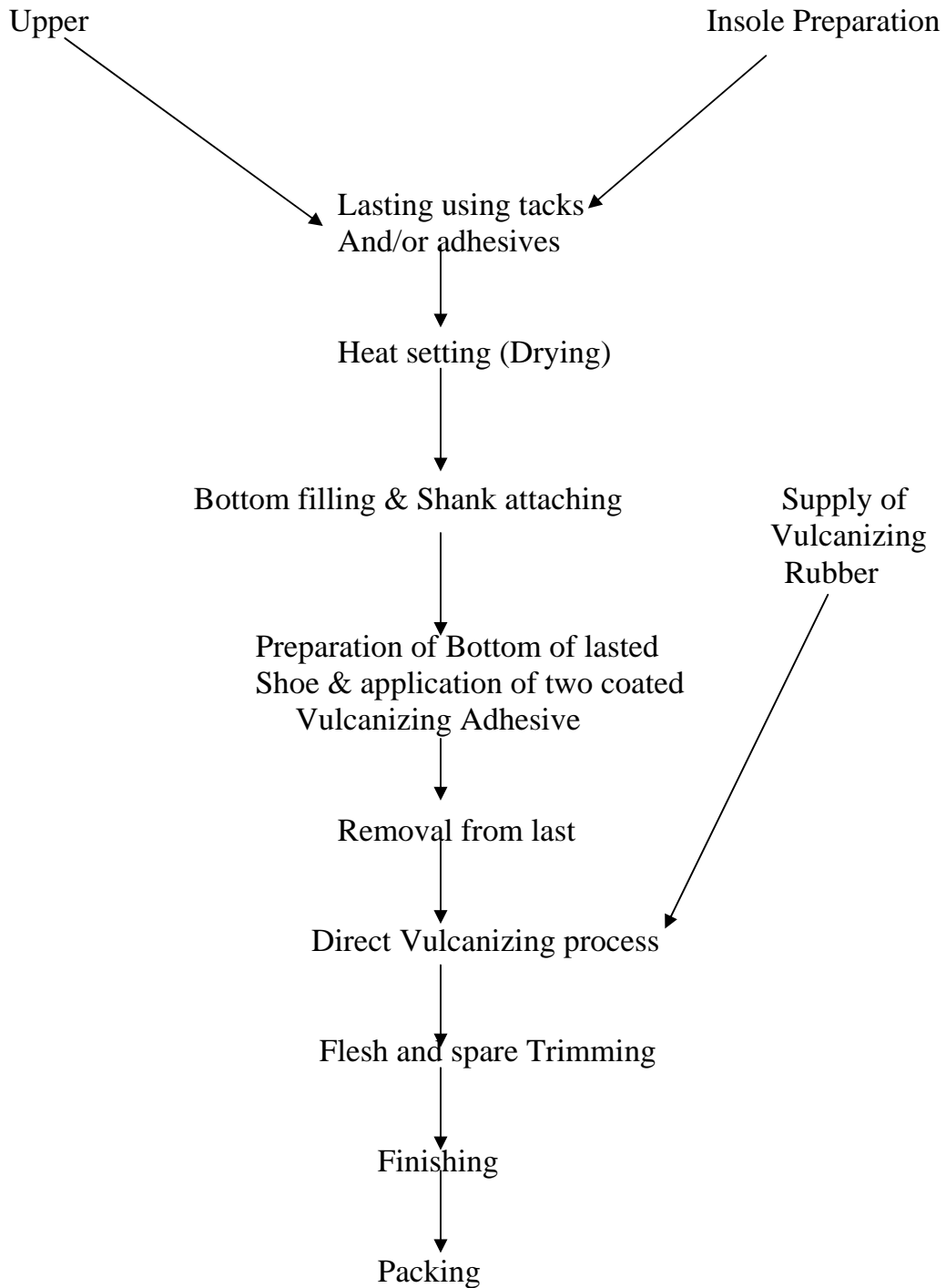
1. Cemented Construction (Hand made)



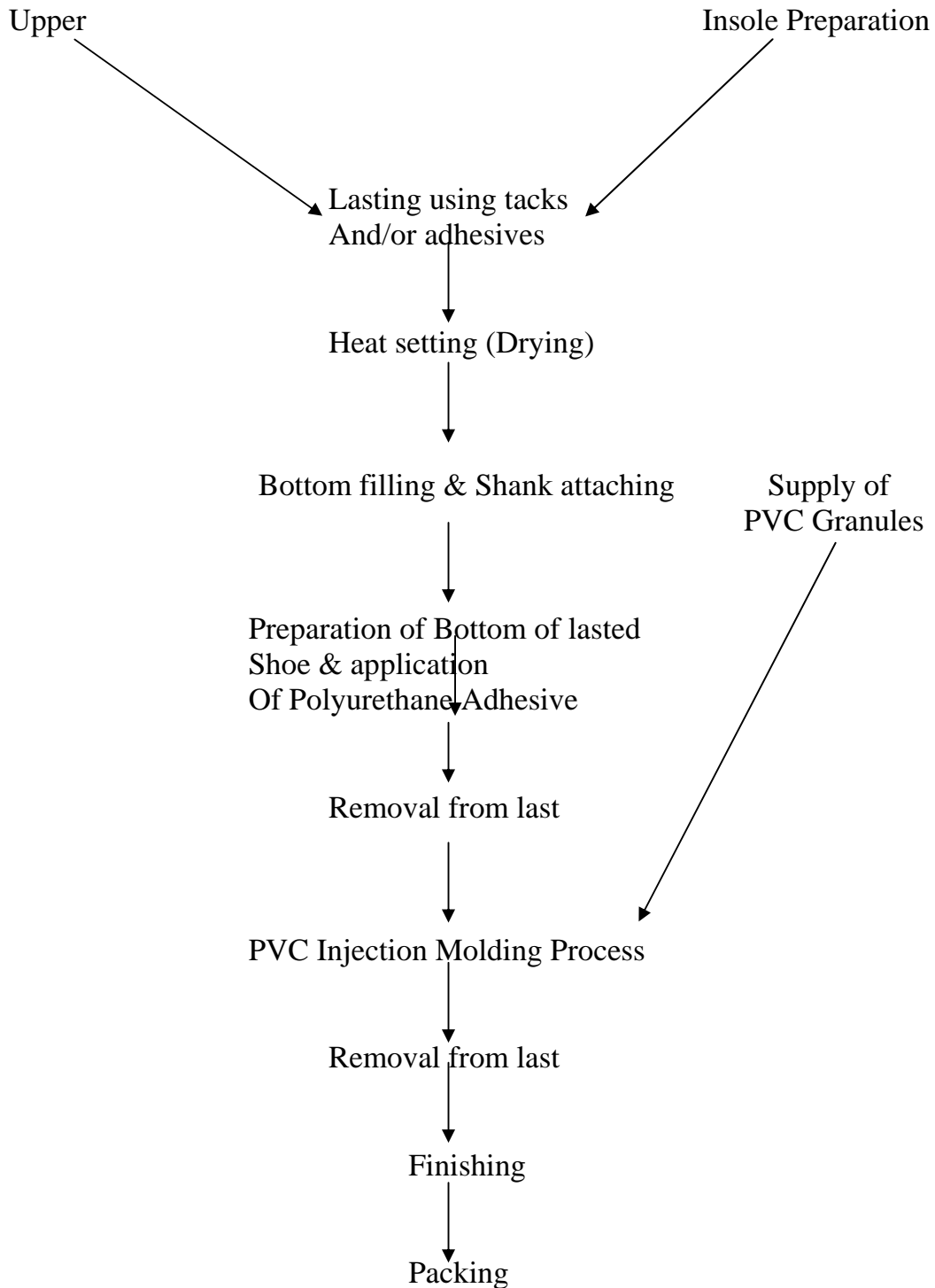
2. Cemented Construction (Machine made)



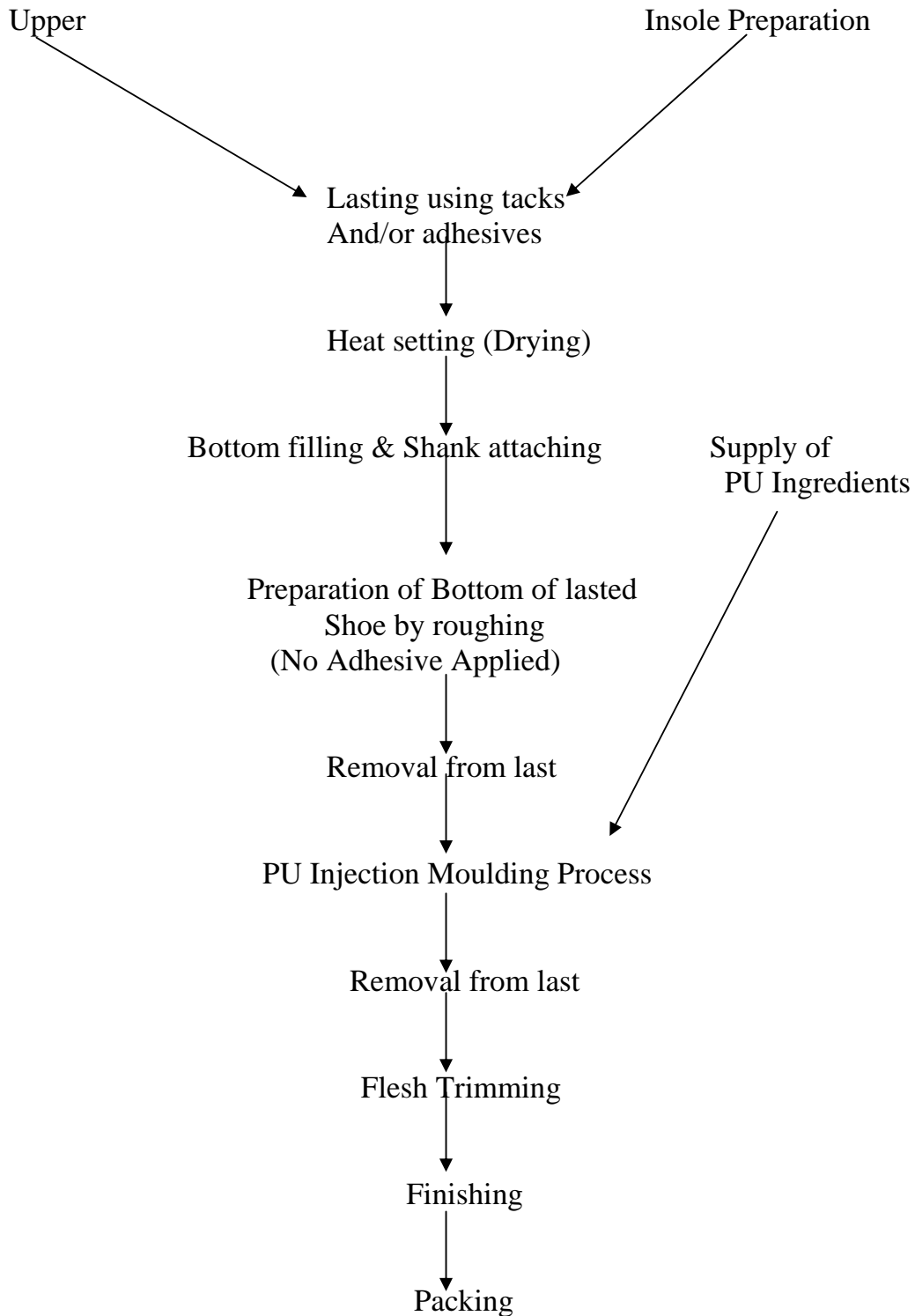
3. Molded Construction (Direct Vulcanizing)



4. Molded Construction (Injection moulded PVC)



5. Molded Construction (Injection moulded PU)



3.7. Cost of Production per Pair of Shoe

The cost of production per pair of shoe varies according to the types of units, use of raw materials, technology and who the buyers of the shoes are. As the Agra footwear industry is mainly classified in four groups like household units, household workshops, small workshops, large workshops the cost of shoe production and selling price of the footwear for all the above mentioned four categories are given below.

1. Household Units

Since these units cater to the needs of the poorer of the poor with regards to shoes hence they have to bring down the cost of production as to be minimum. For this they purchase cheap and substandard shoe materials and they assemble it bring in down retail price between Rs 70/- to 120/- per pair of shoes.

2. Household Workshops

This group of footwear manufacturers employed between 8 – 15 workers and also work with them in the production of shoes but they somehow try to maintain the quality and specification which raises the cost of product and per pair of shoe cost varies between Rs 150/- to Rs 300/- catering to the needs of poor and lower middle class people.

3. Small Workshops

This group manufactures employed work force and they act as managers. Their cost of production is at the higher side bearing between Rs 250/- to Rs 600/- per pair which suffices the need of middle class and higher class people.

4. Large Workshops

This group of shoe industries uses mechanised plants and they are responsible for export production. They are quality conscious and strictly follow the instructions of the foreign buyers. Their cost of production varies between Rs 500/- to Rs.1000/- per pair.

4. Marketing

Agra is India's most diverse and mostly knit footwear cluster having around 5000 mostly informal cottage and small scale units providing the employment to 60000 skilled workers and produce approximately 3 Lacks pair of footwear per day. Agra is characterized by a deeply rooted caste based artisans' communities (mostly Jatva's) that makes the shoes and other community is doing marketing for them. It is to be mentioned here that

marketing people are predominantly forward cast Hindus who born is Punjab and Sindh. Further Sikhs and Muslims are also engaged in this business. The key position of marketing previously held by Muslims is presently taken over by Punjabi and Sindhi and the main centre of activity is Hing-Ki-Mandi Agra.

Now the local traders which are around 500 to 600 engaged in marketing activities are centre in Hing-Ki-Mandi Agra. This market was developed some where in twenty Century. Even today the local traders who deal in mainly basic and chief footwear follow the two buying strategic mainly:-

1. Direct sales transaction on prior order.
2. Purchasing product from the artisans without prior order.

The 'Purcha' system of payment in the Hing ki Mandi market has greatly affected the small manufactures in selling the shoes. The modus operandi of this system is that while procuring the shoes, the wholesaler's dealers issue a credit slip for the value of shoes to the supplier. This credit slip called 'Purcha' which can be incased only after three months, but due to shortage of fund the manufactures incases his 'Purcha' from the financier by paying 1 to 1.5% as commissions over that. This means suppose a Purcha has been issued to a manufacture for rupees 1000/-, now if you want to cash it immediately then he has to go to the financier who will deduct a commission of Rs.30/- on it and will pay him rupees 970/- in cash. Letter on this financier Will in cash this Purcha from the wholesaler which has issued at full cost.

As the small producers have to invest in procuring raw materials and accessories for the production to maintain the family, they are forced to accept this kind of discounted payment.

Recently due to economic liberalisation some SSI units producing very good quality of footwear are sold to these traders and other wholesalers in different parts of India.

The marketing channels of this cluster can be characterized in five main market channels that are as follows:-

1. **Direct Sales**

The smallest home based units run by artisans using primarily family labour, depended on direct sales. The artisans, who rely on direct sales, are around 75% to 85% transecting exclusively with Hing ki Mandi. Traders buy the stadardised ready made shoes from artisans on the spot. As all the artisans know which subset of traders may buy particular designs on a specific reason.

2. Working on Order for Local Traders

The second main market channel deals with a owners of small and medium sized workshops who work on order for local traders. The smaller workshops usually get order for rather cheap shoes from local wholesalers.

While a few of the medium sized workshops are able to get orders for some what more fashionable and more expensive shoes. Producer – trader relations are basically as antagonistic as with direct sales, even though artisans desperately try to build up some earned trust.

In the medium – quality segment owners of somewhat larger workshops usually have a trader's background. Since in the early 1970s these trader entrepreneurs have set up an increasing number of somewhat larger workshops and small scale factories, in which Jatav artisans are employed on piece rated.

3. Premium Domestic Market

Few hundred entrepreneurs had outgrown the local traders and directly supplied footwear for the well to do traders in the metropolitan areas. In this premium, fashion driven segment traders and manufactures need to adjust product specifications overnight. Such as ability to incorporate quality last minute change is prerequisite for success in this volatile segment.

Another group of producers supplied the premium domestic market segment by working for one of the powerful and well paying large Indian footwear concerns, such as Bata Indian etc. These large Indian footwear concerns demand continuous high quality performance. The major decisions on the product specifications are taken at the headquarters of these large Indian footwear concerns.

4. Indirect Exports

The indirect exports boom to the Soviet Union started in the early 1980s when organized workshops enterprise groups secured bulk orders through high government channels in Delhi and Moscow. These workshops also obtained orders through local representatives of Indian based export trading houses.

The indirect exporters predominantly produce cheap imitations of previously successful designs, which are sold in discount store in Europe and The USA and on markets in Gulf States.

The Indian Traders concerns are responsible to the foreign buyers and subcontract through local purchasing offices.

5. Direct Exports

The most resilient and profitable relations are reserved for Direct exporters the fifth market channel, who deal directly with foreign buyers from

European or North-American ware houses or retail chains. They need to collaborate intensively on fashion-oriented sample making. Agra manufactures offer supplying the samples to the foreign buyers, negotiate the rates with them and obtained order accordingly.

In last few years due to very good relation and networking among these exports and foreign buyers of Leather product has increased tremendously. The exports from Agra for last 3 years are as below:-

Export figures of leather & leather products (Value in Million Rs.)

S.No.	Product	2001-02	2002-03	2003-04	2004-05
1.	Finished leather	7.74	2.97	-----	.742
2.	Leather Footwear	4612.27	5195.56	5971.74	6914.65
3.	Footwear Components	514.13	382.98	649.8	689.56
4.	Leather Goods	-----	42.95	50.71	-----
5.	Leather Garments	14.34	9.98	6.2	-----
6.	Non Leather Footwear	-----	-----	2.43	23.67
	Total	5148.48	5634.44	6680.88	7634.15

Source: COUNCIL FOR LEATHER EXPORTS, AGRA

Table: Market channel characteristics in Agra Footwear Industry

Market channel characteristics	Director Sales	Local Traders	Premium domestic	Indirect Exports	Direct Exports
Type of product unit	House hold family labour	House hold workshop	Small scale factories	Small scale factories	Small scale factories
Employment per unit	3-5	3-9/9-18	20-50	20-50 & above	200 & above
Sample making, setting of product specification	No samples Made	Set by local traders	Initiative by traders, joint development	Set by foreign buyer	Mostly Set by foreign buyer
Price setting	Bargaining after production	Bargaining before production	Bargaining in ongoing relation	Set by foreign buyer	Bargaining in ongoing relation
cooperation between producer and traders	Extremely limited	Limited	High	Very limited	High
trust between producer and traders	Extremely limited	Limited	Very High	Very limited	Very High
Growth options	Extremely limited	Limited	Very High	High	Very High

5. Conclusion

In my previous chapter in that heading typed of production units, I have classified the shoe manufacturing in the eight categories. Now first and second categories that are house hold units and house hold workshops are those units where the workers get training from their parents and are developed groomed into a good shoe skilled labour.

Since these units are house hold family members hence they depend solely on the skills of family members and earned their living by manufacturing the shoes and immediately selling down the market. But these units prepared as skilled work force for the shoe industry, which a latter stage carted to the needs of big mechanised units and export houses. The production done by them is substandard and serves the purpose of poor class people.

Therefore to develop the shoe cluster of Agra it is suggested that all the units should be under one umbrella hence a project of developing 'Juta Nagri' that is plot should be made available to the entrepreneurs as per the requirement further all infrastructure should be provided to them. The facility of training, marketing, test house, availability of raw materials and components etc should be there, so that they will have to waste minimum time and will have access to all the facilities under one roof. This will be a moral booster to them and further the layer will definitely virit them as they will in a united form. Hence this 'Juta-Nagri' can be developed by since government agencies / Concordia in the interest of this cluster.

Now other categories which are rich in skilled and technical know how but these units without R&D facilities have no focus standee for there future survival. If this is not done then in the long time they will be the losers. Hence some test house facilities can be provided preferably in the CFTI, Agra so that the interest of the units is not hampered because the exports of leather products / shoe from Agra are approximately around 750 crores. Hence to keep it this export label and further enhance it the facilities of testing should be provided to the units because at present they go to Delhi and Chennai for this purpose.

Exports of leather products / shoe are approximately around 800 crores. Hence to keep at this export labels and further enhance it the facilities of testing should be provided to the units because at present they go to Delhi and Chennai for this purpose.

Now for the cluster development can focus the units like house hold workers and non-house hold workshops. These can be groomed up and are ambitious being developed to the cluster because they are some what educated and have finance if some concrete advise is given to them. Therefore these units can be groomed up into a big cluster of the shoe industry as what we desire off. Hence now onwards main emphasis will be on these two types of categories that can be developed into a cluster. Therefore all efforts should be center to these categories.

6. Analysis of Business Operation (Problem Identified)

- Raw materials
- Tools, equipment and machinery
- Products and marketing
- Background of the entrepreneurs and their enterprises
- Finance and working capital
- Manpower requirement
- Infrastructure facilities
- Business development services
- Taxation

6.1. Raw Materials

- (a) Although the raw materials are easily available in the market but during the peak season the rates of raw materials are high hence the unit holder has to sell out a good amount for the purchase of raw materials.
- (b) In the domestic market the raw material which is mostly used is synthetic leather which is cheaper as compared to pure leather and is off sub standard quality, but the get up after manufacture of shoe and its cutting value are at higher side hence the manufacturers prefer synthetic leather as compared to pure leather. However the pure leather is exclusively used by the exporters and big manufacturing workshops. The synthetic leather and other raw materials are manufactured by India, Taiwan, China, etc.

6.2. Tools, equipment and machinery

For domestic market tools, equipments and machinery are locally available which carters the need of this segment. However for big export workshops machinery and equipments are mostly imported from countries like Italy, Germany, UK, and Taiwan etc.

6.3. Product and Marketing

The main problem faced by this cluster is marketing. The domestic manufacturer after the production goes to the wholesalers and sales his products on credit of three months. But since this domestic supplier is in urgent need of money hence he sells. Letter of credit (Purcha) to the financier who deducts 1 % 1.5 % and pays him the rest of the amount.

Since these manufactures can not hold the stock hence they are bound to sell his product at much lower rate and the price of his product is decided by the person who issue a letter of credit (Purcha).

6.4. Background of the Entrepreneurs and their Enterprises

A majority of the enterprises are family owned. The owner and other family members are the manager, operator, marketer, technician and negotiator. There are hardly any qualified people recruited from outside. As a result no fresh idea come up to them and the process of manufacturing remains traditional, And need to understand that there are several functional areas in an enterprise where qualified and experienced persons are required.

The level of awareness of the entrepreneurs; especially in technical and marketing area is not as high as it should be. Low level of education and inability to communicate in English has remained a major problem for them.

The main community which was credited for manufactures of shoe are Jatavs and they are traditional workers from generation to generation, now the trend has changed the other communities like Sindhi, Punjabi and other for board castes have also joined this race, hence the competition is good forward castes.

6.5. Financed and working capital

The major problems faced by this cluster are of finance and working capitals. Since these units are managed by family members or a group of persons hence investments in the units are limited. They can not put more money into the business since they already are from hand to mouth. They require amount of money after the production of a lot and they can only survive for a fortnight beyond this they cannot go.

6.6. Man Power Requirement

The men power of skilled workers is easily available but this work force is illiterate hence they depend on traditional know how and razed to new processes which can give better shape and looks to their products if they are given good training.

6.7. Infrastructure

This cluster is mainly located in house holds that is they operate from their residential premises as they themselves and their family members work in the units. Due to manufactures from house the problem of sanitation is mainly faced by these people because the odour of the product is dissolved into the atmosphere of the house hold, which every time gives stinky smell.

6.8. Business Development Services

The main problem faced by this cluster is of testing facility. The facility provided by State Trading Corporation (STC) Agra is on very limited scale hence the manufactures are compiled to rush to Delhi and Chennai to get its product tested as per the specifications of the buyers. This causes lot of inconvenience to the manufacturers in terms of money and time.

6.9 Taxation Problem

Since a pair of shoe costing around Rs 200/- is tax free in Delhi. But in U.P. it is entirely different. Here the manufacture has to pay the tax at the rate of 4% if he uses synthetic leather other vice he has to pay taxes 8% if he uses pure leather. This factor has really hampered the shoe cluster at Agra because the counter part sitting in Delhi enjoys the benefit of lower tax.

7. Industry Structure Analysis:

Entry barriers: Low	Rivalry: Moderate
Bargaining power of the suppliers: Low	Bargaining power of the customers: High

The above figure depicts the Industry structure Analysis of the brass parts cluster in Jamnagar. This industry structure analysis determines firm level profitability, competition SME viability and prospect of growth.

The entry barrier in the above cluster is low because anyone can enter the industry with a minimum investment of Rs. 30000-50000/- and inputs are available plenty. There are no proprietary skills/ technology and there is hardly any product differentiation and brand identification. But for some enterprises which are supplying their parts, components to the large industries and fixed clientele abroad for the last 20-25 years.

Another positive factor is economies of scale which mean more you produce the less is per unit manufacturing cost. This is to say as you increased the production the cost of unit goes reducing. Further adoptions of latest technical know how (which is a costly affair) can certainly provide impetus for the growth of these industries. Hence it is emphasized that the Brand building should be done because once the brand name is known to the customer follows the suit.

The rivalry amongst firms is moderate. Though there is rivalry in the domestic market, but it is limited in the exporting market front. Most of the producers have mixed clientele abroad to whom they are supplying for the last 15-20 years. There is large number of firms in the industry and the product differentiation is minimal. With the opening up of economy after

globalization, the growth potential of the industry is tremendous, provided technology is upgraded, economies of scale is achieved and marketing consortia is formed. Rivalry among firms can be reduced by encouraging non-price competition and product differentiation; notional or real (may be with diversification). Rivalry is moderated by the fact that the exit barrier is also very low.

The bargaining power of the suppliers in the cluster is low and there is large number of suppliers available in the market. There is hardly any switching cost from one supplier to another and no input differentiation.

There is hardly any evidence of suppliers forward integrating. Forming hard networks for common bulk purchase can further reduce the bargaining power of the suppliers.

So far bargaining power of the customers is concerned, it was found to be on the higher side. There is hardly any product differentiation and the customers can switch from one supplier to another. The switching cost is also very low. Moreover, customers are quality and price sensitive. However, for some enterprises there is strong customer-supplier relationship and the level of trust and loyalty is very high. Some customers of the large industries do not want switch over to new supplier on the fear of getting bad quality and not “in-time” delivery. Forming consortium and brand buildings can reduce the bargaining power of the customers.

8. SWOT Analysis:

STRENGTH

<p>Markets: Strong presence in the domestic market. Traders/Wholesalers are present in the local market. Ancillary arrangement with medium/SSI units. Development trust and relationship in the long run. No import is requiring as all items are indigenous.</p>
<p>Technology: Availability of customized and local made machines. Machinery is available at low price. Tools & equipments locally manufactured and available at low price.</p>
<p>Inputs availability: Raw materials are available in sufficient quantity. Availability of other inputs like Adhsives,chemicals,Last,Punch,mould,Grainderies and packing materials (Boxes)etc.</p>
<p>Innovation capability: Ability to develop duplicate and customized machines. Flexible operating practices.</p>
<p>Skills: Workers are very skilled and working like machines. Workers are specialized in specific field. Most of the job is learnt while doing in house hold units.</p>

Vast pool of skilled laborers.
Business Environment: Stable business environment till today and increasing day by day.

Weakness

Markets: Loosing ground in the domestic market due to mechanisation and set up Mechanised units at different part of the country. Imports started coming in especially from China. Middlemen/traders enjoying most of the profits in the value chain.
Technology: Tradition method of production. Low level of technological development. Manufacturing defects and use of substandard materials. Problem with quality and productivity.
Inputs availability: Most of the raw materials are indigenous. Imported materials are also used.
Innovation capability: Very frequently changes in design, technology, process and marketing due to foreign branded footwear availability in the market.
Skills: Skilled workers are specialized in particular types of operation. No skill up gradation training for the workers.
Business Environment: Business Environment is changing. Competition is going to increase.

Opportunity

Markets: The domestic market has tremendous market potential and can be utilized at the maximum. Globalizations can user tremendous market potential for the competitive firms (entire globe is the market – global village). Tariff and non-tariff barriers are depleting. Quality and productivity is the rule of the game. Enterprises can join hands together for international marketing, brand buildings and participation in trade fairs.
Technology: Advent of latest technology with the intervention of CLRI, FDII, CFTI and foreign country. Creation of technological awareness among entrepreneurs. Tremendous enthusiasm on the part of the cluster actors. Possibility of establishing consider for providing technical know how.
Inputs availability: Competition is going to make availability of inputs cheaper and sufficient.

<p>Innovation capability: Exposure visits, participating in exhibitions may make the entrepreneurs and technicians more innovative and problem solving. Demonstration effect /awareness program.</p>
<p>Skills: Increased awareness is likely to improve the skill base of the workers.</p>
<p>Business Environment: Changing business environment and marketing channel can provide opportunity for enterprising firms.</p>

Threat:

<p>Markets: Competition is going to increase because of setting up modern units elsewhere in the country. Overseas importers are smart enough to change their sourcing country. Survival of the fittest.</p>
<p>Technology: Low level of technological development. Technology can impose a major threat unless it is changed/ modernised. Technology is an ever changing process.</p>
<p>Inputs availability: Difficulty in encountering competition unless raw materials are made cheaper. Quality of raw materials. Quality of footwear components.</p>
<p>Innovation capability: Innovation is required in every facets of business operations.</p>
<p>Skills: Skill base of the workers needs up gradation to adopt latest technology.</p>
<p>Business Environment: The changing business environment is always a problem for the less enterprising firms.</p>

9. The vision of Agra Footwear Cluster

“Domestic and Export-led growth with emphasis on technology up gradation, marketing and networking”.

Strategy

The footwear cluster in Agra has enough growth potential provided strategic intervention is made in certain ‘key areas’. The clustering phenomenon was a natural process and it sowed resilience in terms of encountering various problems in the past.

The key areas in which the strategic interventions are needed are given below:-

- Product development / designing and pattern cutting
- Technology up gradation
- Networking among cluster actors
- Developing among BDS
- Domestic / export-led growth
- Liberalising Govt. rules and regulations
- Setup of footwear Components Park

These are discussed in detail in the action plan. Moreover for making the cluster development initiative sustainable in the long run, it is imperative to ensure ‘capacity building’ of the cluster actors. An outside organization intervention cannot produce desired results, especially in the long, unless efforts are made for capacity building of the cluster actors. The cluster actors should realize ‘the need to change’ (in the changing scenario) and initiate actions in order to solve their problems and making themselves competitive. What is important here is that the process of change should be internationalized rather than imposed.

10. Action Plan

1. Product Development / Pattern cutting and Designing

The strategy for the development of shoe by pattern cutting and designing is surfeited that short term and long term training programs should be provided to the members of the unit who are engaged in this operation so that they can utilize their expertise while manufacturing the shoes. This job can be handled by subconsodia or some institution/ government body who can organize such types of courses for the benefit of this workforce. Because in future they will not only be benefited but the entire production and the name of the Agra cluster will come up on the top, giving them brand name which they are seeking for.

2. Technology Up gradation

The main point for technology up gradation circle around the shoe last. If the shoe last is good then the item prepared will naturally be the best. Therefore they should be persuaded to use PVC shoe last instead of wooden shoe last, because in PVC shoe last the shape and size of these lasts remains same. Whereas in wooden shoe last the shape and size of these shoe lasts get deformed.

In the roughing operation when the labour is doing this operation of roughing so that it can be attached to the sole. The dust which comes out

during the roughing operation directly goes in to nostrils of the workforce causing diseases like TV and others can be minimized, if the dust collectors are attached to the roughing machine.

Around 20 to 30% of workforce while sticking uppers to the bottoms take the help of stitching because they know that they are not using proper adhesives and methods, the pasting can give way. This practice should be cartel and they should be taught to use proper adhesives and technology so that the pasting lasts for ever and which definitely fetch them good market price.

3. Networking among the Cluster

The networking among the cluster actors is very limited. Moreover, the role of the association ends in organising periodic meetings. Only when the entrepreneurs face pressing problem, they do interact in groups. For example, if the cluster of Agra comes to know that in particular states taxes are lesser as compared to their state then they will definitely unit and fight it out with the government to have the same tax pattern, so that there margin of profit may increase.

A strong network has to be created among cluster actors so that they can jointly solve each others problem, perssurise Govt. in liberalizing the rules and regulations. They even can jointly market their products in the global market in order to compete with “the economies-of-scale” approach of Chinese manufacturers. The industry association needs to be made proactive and networking has to be strengthened. This can be taken up as a part of capacity building exercise. The benefits of networking have to be explained to them.

4. Developing BDS

Due to lack of marketing knowledge this cluster is suffering the most. Hence some types of consortia on marketing may be formed so that these units can get a good market price of the product. Because this is a seasonable industry and if they do not get proper price of the product than how will they survive in the lean session. Further they should be provided or rather a consortia should provide them the facility of test house so that the can get their product tested and evaluated to do proper grading of their lot.

5. Domestic Exports / Led Growth

If the domestic market flourishes than definitely export will increase hence our all potential should entered to the point that domestic market does not loose the heat. If this segment comes down then automatically on export side

we will be the loser. Hence a sound domestic market will definitely give the cluster the booms required.

The taxation policy should be the same throughout the country so that where even the product is made the taxation is the same which will definitely encourage the entrepreneurs who are managed in this sector.

(6) Liberalizing Govt. rules and regulations

The entrepreneurs are finding it difficult to comply with the rules and regulations of several Govt. departments. Most of their time is spent in filling up forms and submitting papers as per their requirements.

Therefore Govt. rules and regulations have to be liberalized. The role of the Govt. departments should be a facilitator rather than regulator. An awareness workshop for the Govt. officials in the form of “department-enterprise interface” can be organized.

Footwear Components Park, Agra

The Agra footwear Infrastructure Company with the help of CLE has designed a footwear component park at Agra where all the components required for the manufacture of shoes will be manufactured.

The project of footwear Components Park has been prepared and is requiring necessary sanction and will be coming up in the near future.

11. Proposed activities for the year year: 2005-2006

S. No	Activity	Type	Objective	Durati on	Fund require d	Benefi ciary	Facilitati ng Institutio n
1.	Organising meeting with cluster actor (2No.)	Trust Building	To create awareness & disseminate the objective of the project to the Beneficiary	1Day Each		SMEs	
2.	Workshop on Needed Technology (2No)”Sensitisation Workshop”	Regul ar Activi ty	Appraise the SMEs about the requirement of technology upgradation to improve quality and productivity	1Day Each		SMEs	
3.	Training programme on Entrepreneur	Capa city Build	To train cluster actors on various facts of Entrepreneurship &	3Days		Cluster actors	

	ship	ing	improve there level of motivation				
4.	Training programme on Patter Cutting & Designing (2No.)	Prodt Devel opment	To train cluster actors on various types of Product Development (Footwear)	3 Month		Cluster actors	
5.	Network formation	Capac ity Buildi ng	Forming consortium for joint benefits	3 Month		CDE/ Cluster actors	
6.	Exposure visit to Chennai/ Delhi fair	To create aware ness	Awareness about raw materials, Machines & Product	3Days		Cluster actors	
7.	Preparation a Data bank of BDS providers	Pilot initiati ve	Providing information about BDS actors	3 Month		Cluster actors	
8.	Preparation of Footwear Manufacture Directory (Agra)	Regul ar Activi ty	Data of Footwear Units			CDE/ SISI Agra	

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“Domestic and Export-led growth with emphasis on technology up gradation, marketing and networking”.

