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Investigating the Potential to Incorporate Bangladeshi Textile Crafts into a Global Supply Chain

A thesis submitted to the University of Huddersfield for the
degree of Master of Arts by Research in the School of Art,
Design and Architecture

December 2012

Shaila Afroj

School of Art, Design and Architecture

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ABSTRACT

The purpose of this study is to explore craft textile production in Bangladesh and the implications for its incorporation into the international supply chain. International trade brings revenue to governments in the form of foreign exchange; craft offers a comparative advantage as it potentially embodies the culture and heritage of the land of origin thereby imbuing it with uniqueness. Craft textiles which currently survive in remote village areas struggle to compete in the global market as there are no strong networks to reach international market. Internationalisation of these Bangladeshi craft textile is essential not only to keep the local heritage alive but also to secure finance of rural poor people especially women. In order to understand the contexts of the Bangladeshi textile crafts, key issues of the global supply chain such as buyers and manufacturers, networking and communication, design strategy and preservation of traditional designs, quality, price, and lead time were identified from the literature reviewed. The central notions of the research are that (i) exports of craft textiles are of significant value to developing economies such as Bangladesh, (ii) craft production is an accessible business requiring little initial investment for technology and generates revenue for local and this is especially important for women as they are a high proportion of workforce in the craft sector and (iii) the low initial investments lead to much production taking place at home raising issues of inequalities of age, gender, income and opportunities.

The research took a qualitative approach to interview members of a conceptual supply chain in Bangladesh that may play a role in developing an international market for the traditional textiles. The members were: textile craft manufacturer, a senior officer in the export department of textile craft manufacturer and retailer, a merchandising manager in a textile sourcing house in Bangladesh, a mainstream apparel buyer in UK, employee of a craft retailer in UK and a researcher, and teacher of textiles of Bangladesh

From the research conducted, it was found that the Bangladeshi craft industry needs to focus in three major areas: Marketing and promotion of the products to international market, introduction and communication with potential buyers, and enriching market knowledge. From the interviews conducted it is appeared that other issues associated with exporting textile crafts in a position to be improved with proper planning and practical implementation. Finally a structure of an integrated supply chain was proposed, however this may have limited applicability to companies at different stages of export market development.

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ACRONYMS

AAF	Ayesha Abed Foundation
ABH	Action Bag Handicrafts
ATMI	American Textile Manufacturers Institute
ATOs	Alternative Trade Organisations
BGBA	Bangladesh Garments Buying Association
BGMEA	Bangladesh Garment Manufacturers and Exporters Association
BHB	Bangladesh Handloom Board
BRAC	Bangladesh Rural Advancement Committee
BSCIC	Bangladesh Small and Cottage Industries Corporation
DCMS	Department for Culture, Media and Sports
DwB	Design without Borders
ECOTA	Economic Cooperation Organisation Trade Agreement
FOB	Freight on Board
HH	HEED Handicrafts
ILO	International Labour Organisation
JDPC	Jute Diversification Promotion Centre
MFA	Multi Fibre Agreement
NCCB	National Craft Council of Bangladesh
RMG	Ready Made garments
SME	Small and Medium Enterprises
UN	United Nations
UNCTAD	United Nations Conference on Trade and Development

UNESCO	United Nations Educational, Scientific and Cultural Organisation
UNICEF	United Nations Children’s Fund
UNIDO	United Nations Industrial Development Organisation
WIPO	World Intellectual Property Organisation

CHAPTER 1 - INTRODUCTION

1.1 Research Context

Craft or artisanal products are special in their nature for their distinctive properties, which can be functional, utilitarian, artistic, creative, decorative, aesthetic, traditional, culturally attached, socially symbolic and religiously significant (UNESCO, no date). According to Scrase, the “significance of craft product lies in the fact that this industry exists in the global economy from pre-industrial to industrial and post-industrial period” (Scrase, 2003)), and the meaning of the term ‘craft’ has also changed over these periods of time from ‘skilfull labour’ to ‘an aesthetic appreciation of the crafted object’ (McAuley and Fillis, 2005). The high degree of manual contribution to the making of the product is a significant attribute of the craft product but this does not exempt the use of some mechanical tools and or the use of non-traditional raw materials (McAuley and Fillis, 2005; UNESCO, no date). The craft worker has been described as either having a degree of labour autonomy in an environment with limited access to cash (Scrase 2003) or as without autonomy of labour, poorly paid with little hope of consecration (Banks 2010). Regardless of how autonomous the labour of the craft worker is regarded, it is recognised that the commodification of the craft product has raised issues regarding divisions between gender and generations, and relations between families and communities (Scrase, 2003). Moreover, craft products leave a great effect on the postmodern consumer sentiment in the globalised economy, as it represents traditional form of design which are earthier and produced manually by the artisan, connecting consumers of the modern technological world to a history and localised cultural identity, as it can speak of a world gone by (Scrase 2003).

Issues raised from craft production differ between the economically developed and developing nations, such as outsourcing, use of technology in the economically developed nations and gender and inequality of opportunities in the developing nations (Murray 2011). This thesis examines the issues raised for craft production in Bangladesh. Bangladesh is an agro based developing country in the South Asian region and the policy documents of the Government and NGO’s are concerned with poverty alleviation. Moreover, women’s employment in an active economy has been a growing concern of economists, planners, and the governments. However, this large section of the society has been deprived of equal access to employment opportunities in Bangladesh because of the social and religious restrictions to their work outside of home. Female employment tends to take place primarily in home-based agricultural work, secondly in livestock and poultry business, and thirdly in handicraft business (as this sector cannot offer access to the unskilled worker) (Kabir & Huo, 2011).

The weaving sector is significant; according to BHB (BHB, 2011) about 1 million weavers are directly involved in this sector, with 50% of female manpower engagement. In addition dyers, hand spinners, embroiderers and allied artisans are depending on this industry. Therefore, the livelihood of this large manpower is directly associated with the survival of this sector. Women's involvement in weaving and handicraft production is high, because the landless or the families with marginal income and weaving skills get involved in this sector with little investment. Usually several NGOs provide micro credit loans and offer training for small or medium sized business in rural areas, particularly for women (Begum, 1989).

Textile Crafts of Bangladesh represents information about social relations and artistic convictions of various communities such as tribal communities living in the hilly region, who are continuing this craft over generations. These products are associated with their distinctive local rituals and cultural change over time. In a weaver based community of Bangladesh, their profession is considered to be of such an importance that many of them use cotton for important occasions such as birth, marriage and death, and there are many superstitious beliefs are related to the loom. A weaver's success is in acquiring the techniques of weaving to produce finest quality of rare and unique fabric, which is kept secret within the family and passed down through the generations (Dewan, 2002). As the number of active loom decreases sharply (BHB, 2011), indigenous craft fabric produced in Bangladesh is at risk; market expansion and maximisation of customers are required to stop the loss of craft textiles of Bangladesh (Datta & Streefkerk, 1985).

Therefore, this study aims to understand the context within which the Bangladeshi textile weaver operates (both local and global supply chain) and the potential to engage the textile craft producers within a global value chain.

1.2 Research Problem

Weavers of Bangladesh are producing around 620 million meters of fabric annually by using approximately 0.30 million of active hand looms (BHB, 2011). But this number is sharply decreasing due to lack of running capital and lack of sales, which is the result of a double financial crisis. Weavers are in a situation where they are under pressure to take loans from the local money lenders at very high rates of interest and they are forced to buy the raw materials like yarn, dyes and chemicals at a higher rate than the local market rate. Moreover, they have to sell their products to a middleman at a lower rate, who reaps maximum profit (Raihan, 2010). In addition, artisans are often deprived of knowledge about how to prepare and present a loan application, and individual weavers are generally too far away from international buyers in global marketing chain, which could enable them to get letter of credit to approach a bank to finance the production of an export order.

Furthermore, they lack knowledge about pricing, negotiation and management in institutional level (Benjamin & Malcolm, 1994).

Adequate supply of raw materials and continuous availability of locally sourced materials for handicraft goods is crucial for large-scale expansion of this sector, which has not been assured in most of the developing countries (Benjamin & Malcolm, 1994). Similarly, unavailability and price hike of raw cotton is considered as the second constraint for the development of handloom sector of Bangladesh (Raihan, 2010). National level regulations and policies, and establishment of supplier co-operatives and buying groups can help in this regards (Benjamin & Malcolm, 1994).

Moreover, poor or even no marketing is a barrier for the growth of Bangladeshi Handloom. Technical study and training is necessary to keep pace with current market demand, and to produce a good quality product. In addition, smuggled 'saree' from India are blamed for the deterioration of the cottage textile industry of Bangladesh. The situation is exasperated for some rural weavers who cannot acquire benefits offered by the government as some fraudulent weavers hold the market of the raw materials (Raihan, 2010).

Ghosh and Akter (Ghosh & Akter, 2005) have suggested some local solutions for these problems. Firstly, the Bangladesh Government needs to establish monitoring system through the Handloom Board of Bangladesh to scrutinize wholesalers and retailers of raw materials and prevent them from taking any unfair advantage on price. In addition, a waiver could be offered on the tax of raw materials which would maintain a low price. Moreover, government should take initiatives to make contemporary technologies available in the local market perhaps through waiving all taxes on those technologies. Along with the government, private sector firms could also help to solve the problem of working capital, and train the weavers. Private organisations and NGOs can work together to build up effective and strong distribution channel for the local market. Intensive promotional programs such as sales promotions, trade fair, advertising and exhibitions can help this sector to grow in the local market. Furthermore, government can take measures to create a quota system for the handloom industry.

Benjamin and Malcolm (Benjamin & Malcolm, 1994) have researched alternatives for the survival of the textile craft sector in Bangladesh. These alternatives include involving individual weavers with trade associations and internationalisation of the craft production. Initial introduction of the group of weavers with such association can be done through trade promotion organizations or chambers of commerce. Many countries have established trade associations that contain craft producers and exporters as member of the association.

Organising artisans for textile craft production through co-operatives is one of the solutions; by facilitating access to working capital, conducting financial procedure for raw material purchase and distribution, to allow the artisans a production. The primary factors that encourages 'micro level' entrepreneurs to move towards 'macro level' network system is that it helps firms to specialise in those elements of the supply chain in which they have competitive advantages; and develop those activities in which they are disadvantaged (Jarillo, 1988). Moreover, micro-sized companies face difficulties in determining export opportunities, having a presence in the global market, funding to start exporting and understanding of international business practices for entry into the export market (Bilkey, 1978). Furthermore, Benjamin and Malcolm's recommendations (Benjamin & Malcolm, 1994) for successful export marketing of handicraft products include: determining the export supply and sufficient raw materials, secure adequate financing, export intermediaries, inform foreign buyers, position the products, establish an export plan, a marketing campaign, organize special events and plan market promotions.

This study will examine the constraints that impinge particular focus on the Bangladeshi woven textile crafts businesses entering into the global market. Weavers of Bangladesh generally produces coarse quality 'saree', 'gamcha', 'lungi' (please see glossary) and all essential items for everyday life (Begum, 1989).

Internationalisation of the textile craft products may be possible through intermediaries, such as private companies or trading houses. These firms with business as well as production knowledge can offer the support to the artisans to deal export business, shipping and freight arrangement, update communication and information, accounts processing and management.

Similar to the national level, internalisation of the craft industry in corporate level is essential, as it is important to identify the limitations, capacity and boundaries of their business. These boundaries could be of enterprise, where a firm interfaces or interacts with another economic entities; or could be of the mature markets and industries where they may colloid, overlap or converge. Relocating the boundary can open the opportunity for a firm to develop its capability and achieve business success. In corporate level, rapid development of resources, use of innovation and growth can bring success; which can be achieved with fundamental transformation, positioning the global business and technology that exceed their own boundaries and other companies around the world (Hagel & Brown, 2005). As competition increases, a business firm with static capacity will find itself outranked by more aggressive competitors, where the challenge is to accelerate its performance improvement and expansion of the market (Murtha et al., 2001).

Therefore, for internationalisation of the product, particularly handicraft products, intermediaries offer the most promise. These intermediaries can be a small private one or can be operated with the support of a trading house, which process the finance and accounts for the artisans. To be effective, such entities need established presence throughout the production area, successful export experience, skilled local business, freight and shipping unit, strong export management, facilities for telecommunication and internet networking, working capital (Benjamin & Malcolm, 1994).

From the literature review, this researcher found it is difficult to get a complete list or specific number of the entities engaged in this industry. According to BGMEA, in total there are 988 buying houses operating in Bangladesh (Prothom-Alo, 2010). However, according to Bangladesh Buying House Association (BGBA), there are more than 1000 local and foreign buying houses in the country (Mirdha, 2008). In addition, a different source refers that there are five thousand buying houses and fashion boutique houses in Bangladesh (Fahad, 2011). Therefore, it is difficult to get an accurate number of exactly how many and what type of buying houses are currently operating in Bangladesh, as the registration body is still at the development stage (Prothom-Alo, 2010). Moreover, from the literature review, the researcher found very little academic literature on the sourcing houses of Bangladesh since this sector has only recently become significant and approximately, 200 buying houses spring up in every five months in Bangladesh (Mirdha, 2008).

1.3 Research Aim

The primary aim of the research is:

- To investigate the potential to incorporate Bangladeshi textile craft into a global fashion supply chain.

1.4 Research Objectives

Research objectives are to:

- Conduct a literature review to understand the Bangladeshi textile craft industry and the global supply chain.
- Conduct in-depth interviews with the people in the supply chain from craft producer to retailer to:
 - i. Outline and understand the mechanism of a global apparel textile supply chain and
 - ii. Identify the constraints regarding incorporating the Bangladeshi textile craft industry into the existing global supply chain.

- Compare and contrast the literature review with research findings to make recommendations for a supply chain incorporating the textile craft producer.

1.5 Summary

The significances of craft products, research context and research problems have been discussed in this chapter, and aim and objectives of this study were identified. This study will further extend on literature reviews of textile crafts of Bangladesh and its existing supply chains. A structure of an integrated supply chain for Bangladeshi textile crafts will be developed and keys issues related to the export of Bangladeshi textile crafts to international market will be identified. The thesis is structured as follows:

Chapter 2 begins with an introduction and historical development of textile industry in Bangladesh followed by the overview of Bangladeshi textile crafts, example of the some potential textile crafts, their manufacturing technology and markets, and local textile design of Bangladesh.

Chapter 3 includes the structure of supply chain of industrial textile products for international market and supply chain of Bangladeshi textile crafts and their export market.

Chapter 4 contains available data collection techniques, research approaches, the methodology and instruments used to conduct this thesis.

Chapter 5 presents the results and data gathered through the qualitative interviews.

Chapter 6 summarises the primary research findings and discusses them within the contexts of literature review and research aim and objectives

In *Chapter 7*, conclusions are drawn and future works are suggested in this chapter.

CHAPTER 2 - TEXTILE CRAFTS OF BANGLADESH

2.1 Introduction

This chapter defines the term ‘craft’ and describes the historical development of the craft sector in Bangladesh. The position of textile crafts within the creative industry and its significance in the social and national level is presented. This chapter provides an overview of the textile crafts market, textile craft manufacturing process and technologies involved with detailed description of some potential textile craft products. The chapter concludes with a description of the textile design industry, its position and institutional supports available in Bangladesh.

2.2 Defining the Term ‘Craft’

Problem raised by the difficulties in defining the term ‘craft’ ranged from difficulties in discussions about the development of the craft sector (Dormer, 1997) to identifying the volumes of output from craft producers and therefore a quantitative assessment of the economic significance of craft production (Friel, 2010).

‘Craft’ may be regarded as ‘skilful labour’ or a ‘class of objects with a high degree of hand-made input’ (Metcalf, 1997). In recognition that the craft sector faces competition from domestic production, foreign competition and mass-produced ‘craft’ goods, this researcher has adopted the following definition of craft:

“an object which must have a high degree of hand-made input but not necessarily having been produced or designed using traditional materials, produced as a one-off or part of a small batch, the design of which may or may not be culturally embedded in the country of production and which is sold for profit” (McAuley and Fillis, 2005).

2.2.1 The Economic Significance of Craft

To identify the craft industry’s economic significance to its home country, the UNCTAD and UNDP developed taxonomy and suitable measurement systems for the creative industry (of which crafts was one of seven sectors), in line with the standard classification nomenclature used by international businesses (Friel, 2010, UNCTAD, 2010). From the year 2002 to 2008 (UNCTAD, 2010), there was considerable growth in the global export of creative goods. In 2002, the value of total creative goods export was just below \$205,000 million, which jumped to about double in 2008 with export value standing at around \$407,000 million. Similarly, the global export of art crafts showed a dramatic growth to the export value of approximately \$32,000 million in 2008 from around \$17,000

million in 2002. In addition, the export value of design sector also went up sharply to just below \$242,000 million in 2008 from approximately \$114,000 million in 2002. Therefore, the design industries were the highest contributor in global creative goods export in 2008 with 59.44% market share, whereas art crafts contributed 7.94%. Art crafts included carpet made from fine animal fibre or plant fibre, handmade lace, manmade or printed knitted or crocheted materials, hand woven or needlework rugs, wicker ware, articles of festivals and carnivals, handmade paper, candle, wood marquetry, artificial flowers.

According to the UNCTAD taxonomy, art craft is most economically significant to the developing economies. Table 2.1 illustrates the shares of export for the seven categories of creative industries output. The percentage figures in parenthesis represent the shares of export for developed, developing and in transition economies. It may be noted that art craft contributed the major share of export of creative goods for the developing economies. Indeed, the craft sector was the only segment of creative industries where the developing economies were in a leading position.

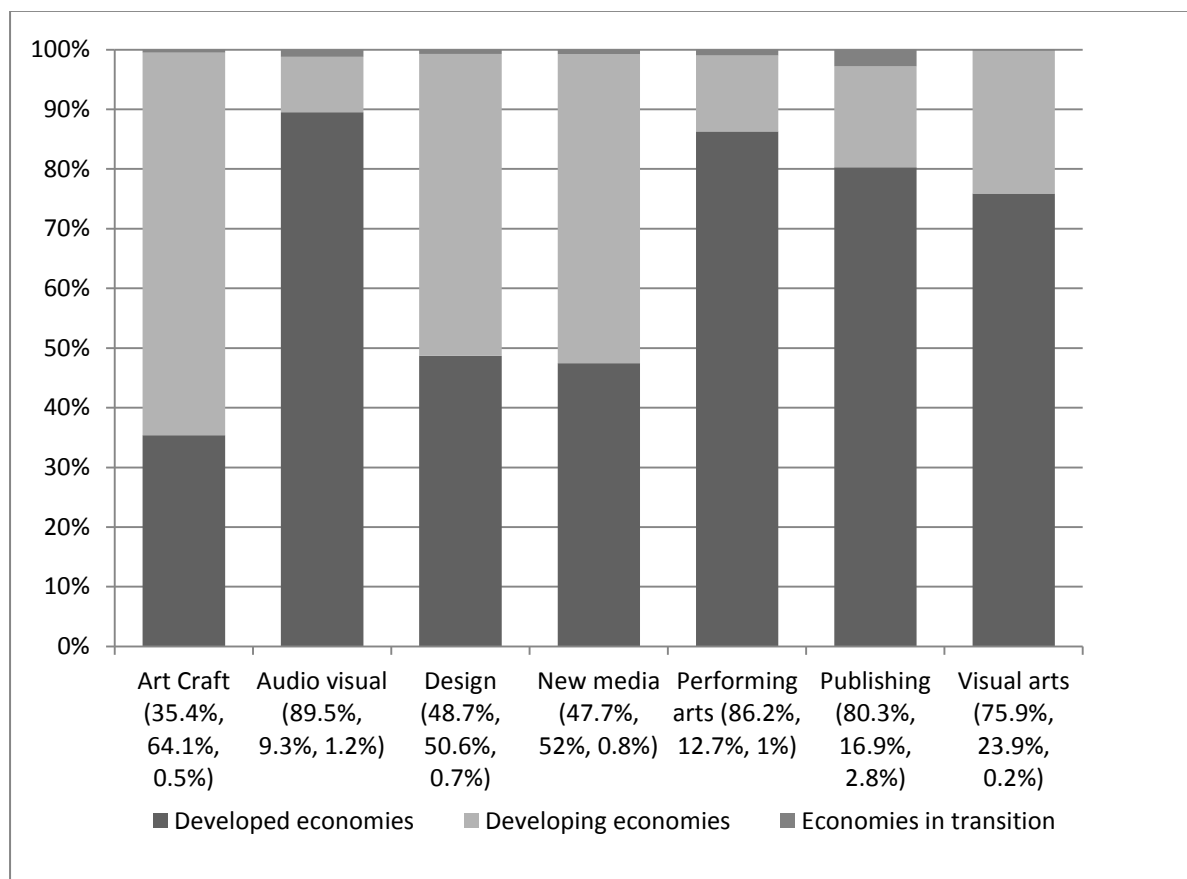


Figure 2.1 Share of Developing Countries in World Export of Creative Goods by Economics Groups in 2008 (UNCTAD, 2010)

Ten major art craft goods exporters are from developing countries of Asia. Among them the growth of this segment was significant in India where they doubled the revenue in 2008 from this sector in six years, reaching \$1 billion. Whereas in some other Asian countries such as Bangladesh, Bhutan, Nepal, Myanmar, Cambodia, and Pakistan, people have taken the professions of these industries as a part time involvement.

2.2.2 Craft Production and the Issues Rose for Developing Economies

Craft production has been associated with culture and heritage and is regarded as an activity of the 'creative industry'. The UK government has defined creative industry as "those industries which have their origin in individual creativity, skill and talent, and which have a potential for the wealth and job creation through generation and exploitation of economic property" (DCMS, 2001). Although the term 'creative industry' is often used interchangeably with the term 'cultural industries' (Kamara, 2008), the UNCTAD stressed more on the artistic component of creative industries as they defined creative industry as "any economic activity producing symbolic products with a heavy reliance on the intellectual property and for as wide a market as possible (UNCTAD, 2010). In different parts of the world, native people and communities are keeping their old traditions alive, and sometimes reviving and rescuing them by reproducing the ancient craft based on their original form and design. Many indigenous communities like Incas in Bolivia and Peru, Mayas in Guatemala are keeping the remnants of ancient civilizations alive. The production and sale of their handicrafts using the traditional design and material are sometimes the only source of revenue for these communities (Silverman, 2011).

Issues raised from craft production differ between the economically developed and developing nations, such as outsourcing, use of technology in the economically developed nations and gender and inequality of opportunities in the developing nations (Murray, 2011). Craft production for the developing economies is an accessible business with few demands for technological innovations or financial capital, relying instead on local resources and traditional knowledge (Friel, 2010). The low investment required coupled with the traditional practices see much of the production being home based which raises a number of issues that have particular impact on the developing economies within a globalised system.

Craft production has been described as a 'weapon of the weak' (Scott, 1985, cited in Scrase, 2003) as well as a 'medium of communication between people who live profoundly different lives' (Nash, 1993 cited in Scrase, 2003, p.450). Scrase described the dual nature of craft production in the developing economies (Scrase, 2003). He noted that one the one hand, the consumption of handcraft 'may imbue the purchaser with a sense of buying tradition' or of 'supporting a struggling

community of workers’ (Scrase, 2003, p.450) and on the other, as the production system was often home-based (as an additional income to farming within the rural population), it often entrenches gender and labour inequalities such as lack of educational opportunities, poor working conditions and associated health and safety problems. Moreover, the marketing system for the craft products has the double problem that (i) it has relied upon networks with middlemen in positions with the potential to exploit vulnerable crafts workers with ease (ii) a dependence on the global demand for the products making the craft worker’s livelihood an unstable one (Scrase, 2003).

2.3 Craft Products and International Trade

Norma Wolff described the highly successful economic activity for Ghanaian wood carvings for the export market as having been proliferated by development agencies such as the ITC, the WTO and UNCTAD under their Export-Led Poverty Reduction programme (Wolff, 2004). The aim was to encourage trade development of crafts and the development of ‘export production villages’ to have a positive impact at all points on the export chains that link producer to the end consumers of their product to ensure employment and adequate income to reduce local poverty’ (Wolff, 2004, p 124).

Given the constraints in exporting textile crafts of Bangladesh in section 3.9 of Chapter 3, it is important to understand that international trade brings in revenue to a government in the form of foreign exchange which can then be traded upon for the benefit for a nation (Begg et al 1994). For international trading to take place, trading nations need to have a comparative advantage in producing goods that are attractive to their trading partner. That is, that the selling nation needs to have developed a specialism (e.g. low cost, or, high specifications) that the buying nation feels is something that they cannot compete with. International trading not only helps revenue but also helps competition and innovation but the drawbacks can include unemployment and potential demise of entire sectors and the ensuing social problems within the nation. To achieve some measure of protection, governments have developed trading policies and tariffs.

Historically developing economies have traded on the natural products of their lands, ‘primary goods’ such as coffee beans, diamonds, etc. as the abundance of intensively farmed land and cheap labour had been their comparative advantage. However, the value in this trade diminished over the years and the call from the developing economies has been for the (developed) industrialised countries to give free access to the developing economies to international global brands (Begg et al 1994). As the value in primary goods has diminished, developing economies need to develop manufacturing within their nations and access international trade through industrialization, a hard task given the problems (e.g. lack of resources such as finance, technology, transport and power

supply infrastructure, technical know-how, etc.). Developing economies have found it difficult to enter the international trading environment as the barriers are high and their level of product specialisation is inadequate for the reasons just described. Where possible, developing economies receive aid as well as pursue their own policies to industrialisation. Aid may take a variety of forms: subsidised loans, gifts of food, machinery, technical help or free expert advisors. Policies pursued for industrialisation may be ‘import substitution’ – where imports are replaced by domestic production under the protection of high tariffs or import quotas or ‘export-led growth’ where production and income growth is led by the export of goods manufactured rather than import substitution. The problem with import substitution is that goods produced domestically may be more expensive to produce (in terms of finance as well as resources) and the problems can be compounded by the reliance on expanding the domestic market (which may not develop). However, an advantage of this policy may be that, in developing an industrial sector, it has to learn to use the technologies to help develop a comparative advantage. Where labour intensive industries are concerned this approach may be of benefit, especially where it proceeds a policy of ‘export-led growth’ – i.e. production and income growth are fuelled exports rather than displacement of imports. Bangladesh (as many of the South Asian countries), pursued import substitution policies between the years 1960 to 1982 and following this a period of export led growth (Begum and Shamsuddin, 1997).

Household-based craft production has raised a number of issues from social to marketing in a globalised market, e.g., equal opportunities, changing nature of gender and generational relationships (Scrase, 2003) to questions regarding the mediation of cultural meaning of art forms; feedback loops that the artisan can make use of to understand their unseen consumers and who the decision makers are along the commodity chains linking artisans to their ultimate consumers (Wolff, 2004). As this research aims to examine the Bangladesh context for the textile craft workers within a global supply chain, the rest of this chapter examines the Bangladesh textile craft sector.

2.4 Historical Development of Textile Industries in Bangladesh

The discussion of the world famous Venetian merchant traveller Marco Polo about the textiles industry of Bengal in 13th century is the evidence of ancient history of textiles in Bengal. The textile industry of Bengal reached its peak in 15th century when the Chinese traveller Ma Huan witnessed five or six varieties of textile products being manufactured (Ahmad, 2005).

Bangladesh was within Bengal in India until 1947. As such it came under the control of the East India Company in 1750. As part of the measures to take manufacturing and production to Britain, all the best quality cotton yarns were transported to the mills there, made into finest quality cotton, muslin

and calico and then sold back in India. By 1828, much of the local cotton yarn production had been decimated (Datta and Streefkerk, 1985).

A short period of prosperity for the handloom industry of Bengal during the early fifties was followed by deterioration during the sixties, and accelerated deprivation during seventies, the decade after the independence of Bangladesh in 1971. In 1978, around 848,000 weavers were employed in the handloom industry; 58% of them were family members and the remaining 42% were employed as wage earners. As stated by Iftikhar-ul-Awwal, 1982, Latif, 1997 (Bakht, Salimullah, Yamagata, & Yunus, 2006), most of the traditional wearing apparels are made of hand-woven fabrics in Bangladesh, which is similar to the other parts of South Asia.

Currently, the handloom industry of Bangladesh produces around 620 million meters of handmade fabric annually with more than 0.3 million active looms, illustrated in Table 2.1, that meets 40% of the local fabric demand (BHB, 2011).

Table 2.1 Statistics on Handloom Industry of Bangladesh (BHB, 2011)

Items	Number
Total number of handloom units	1,83,512
Total number of handlooms	5,05,556
Total number of operational handlooms	3,13,245
Total number of non-operational handlooms	1,92,311
Number of looms of different types	Number
Pit loom	1,69,700
Frame loom	29,212
Waist loom	1,41,684
Semi-automatic / Chittaranjan loom	1,50,407
Banarashi / Jamdani	12,383
Others	2,170
Number of weavers	Number
Total number of weavers	8,88,115
Total number of male weavers	4,72,367
Total number of female weavers	4,15,748
Handloom factory (as of May 2008)	Number
Number of handloom factory* registered with BHB	246
Weavers societies registered with the Bangladesh handloom board (as of May 2008)	Number
Number of primary weavers' societies	1300
Number of secondary weavers' societies	58
Apex weavers' society	01

*Factory is considered as a production unit having more than 20 looms.

2.5 Markets for Bangladeshi Textile Crafts

According to the empirical work of Farid (Farid, 2007), there is a good demand of the local products in the domestic market of around 130 million potential consumers. However, absorption in the international market is important for the large scale manufacturers to produce high volumes. Chapter 3 will discuss routes to market for textile craft products, the following sections discuss how the Bangladeshi textile industry has the potential for entering the international markets. The textile industry of Bangladesh has grown gradually into two separate industries; one is textile craft (alternatively known as handloom as it is based mainly on hand-woven fabrics that mostly serve the local market), the other is machine made textile products developed mainly to target the international market – a large element of this is knitted fabrics.

Between the period 1960 to 1982, Bangladesh pursued an import substitution policy (as many areas of South Asia did). Around the early 1980's an export-led growth policy was pursued and trade liberalisation occurred to enable foreign brands to enter the market. The readymade garment (RMG) industry became the main export – by 2006, this industry contributed 75% of all export earnings and 81% of manufacturing export earnings. The RMG is composed of woven or knitted garments and the technologies for them are different. Knitting technology was introduced to Bangladesh in early 1980's – about the time of the trade liberalisation for Bangladesh. Between 2005-2006, the knitwear sector for the RMG contributed about 75% to the earnings from the RMG exports (Ahmed, 2009).

2.5.1 The Local Market

Though a large number (50%) of population are living below international poverty line (minimum US\$1.25 per day, in 1994-2008*) (UNICEF, 2003), market research from Aarong (largest craft producer of Bangladesh) estimates that a large number of growing middleclass consumers buy cloths at their shop (Aarong, 2011). As described in The Guardian by Allison and Martin (Mathews & Hardingham, 1993), most of the fabrics used for textile crafts are made of cotton, and these fabrics are mainly used for domestic purposes and casual apparels such as 'saree', 'lungi', 'gamcha' (please see glossary), mosquito net. In addition, there are some dresses for the tribes that are made by tribal weavers. Sometimes weavers get the order for undyed fabric, which will be dyed in a fabric form or tie-dyed or printed in a specific pattern that serves the purpose of its end use.

2.5.2 The Export Market

Export markets could be regional (Asia pacific region including Indonesia, Japan, New Zealand and Australia) or further afield. As the industry of local textiles has been expanded over time, therefore local market will not be enough to absorb all the products that Bangladesh produces. Therefore, NCCB is emphasising on developing an international market and found it necessary to engage

international designers for this purposes as there is a shortage of local designers with expertise in international fashion market (Farid, 2007).

Norad, jute Project has been participating in the Hemitextil fair in Frankfurt for exhibiting the jute products of Bangladesh with other high value products of international standard, and getting a good exposers. Though few people of this project prefer internet, editorial publicity and well placed advertisements for communicating with the international buyers rather than spending a large amount of money in participating international trade shows. Similarly, after participating in international trade fairs, two craft outlet owners (Ghuznavi of 'Aranya' and owner of 'Prabartana') expressed their preference for agents to get connected with foreign buyers. In contrast, some other boutiques (Dewan of 'Esheeta') did not prefer the presence of a sole agent (Knutslie & Thommessen, 2003).

Jamdani was extensively used as 'Angarakhans' in Bengal and at the same time it was used in women's dress in Europe's capital of fashion – which is a clear evidence of long-standing export market of Bangladesh (Khan, 2010). Currently there are many countries across the world are importing handloom fabrics from Bangladesh ranging from traditional fabrics to household textiles (BHB, 2011), some 64 hand-woven fabric exporting companies are to be found in BHB website, which is a public organisation working under The Ministry of Jute and Textiles in Bangladesh.

Another success story in international markets to be mentioned is about a Bangladeshi fashion model and designer Bibi Russel, and her company Bibi Production (Culture-and-development, 2008). With a degree from London College of Fashion, Bibi started her career as a fashion model. After having an outstanding career with Chanel Yves Saint Laurent, Armani, Mussoni and Ferrer with Iman and Jerry Hall, and the performance on the catwalk of Paris, Milan and New York, she came back to Bangladesh to start designing her own fashion collections for the international customers in Spain, France, Germany, UK, and several other countries of Europe. She had worked for a long time with the rural handloom weavers to develop high quality and eco-friendly hand-woven fabrics and patterns based on local traditional weaving technique. In 1996, her first collection was presented in Paris with the support of UNESCO, which honoured her work by declaring her as one of their ambassadors. In addition, she achieved 'Freedom Award' and 'United Nations Peace Prize' for her works in the development of the rural weavers, and taking the cultural crafts of her country to an international recognition (<http://www.bibirussell.org>).

2.6 Developing Local Design Identity for a Global Market and Limitations for Bangladesh

In reaching new markets or expanding the existing market, the competitiveness can be improved by using design as a strategic tool. Copying and producing cheap cannot be a strategy that would help Bangladesh to compete in the future global market. It is time to realise that, if you are not winning the market, then you are losing it (Thommessen, 2003).

Latif (Latif, 1997) who suggested the possibility of building linkage of the handloom industry of Bangladesh with the export oriented readymade garments industry in Bangladesh, by strengthening the export potential of both industries. But Knutslien S. and Thommessen (Knutslien & Thommessen, 2003) also identified that the institutional incompatibility between the local production and global market which need to be considered. His concern was about the exchangeability, consistency, multiplicity and uniformity of local production capacity based on local crafts; and cultural identity which might conflict with the export oriented market; the two systems of design demands dual perspective. On one hand, there needs to be a clear understanding of the perspective of western design history where goods may be targeted for export, on the other hand there is a corresponding limited knowledge about western industrial design identity construction and social development. Margolin (1996) noted that a balance between two opposing directions was needed - global exchange between creative, inclusive, national design identity and aggressive, exclusive design identity (Banu, 2009). Banu (Banu, 2009) cited DwB report, which suggested two requirements to compete in global market based on industrial production model. Firstly, it is necessary for Bangladeshi design sector to learn the operating language of industrial design; secondly, create a unique design perspective which is capable to compete in foreign market.

Knutslien S. and Thommessen (Knutslien & Thommessen, 2003) identified four phenomena that needed to take place to engage in world fashion market, where Bangladesh lags behind.

The first criterion is to maintain a strategic business relation. It is necessary to have national level policies and corporate level design policies, to compete with competent countries' policies. For example, the Japanese Government established a policy for improving design in late 1950s.

Secondly, the designers in Bangladesh need to have a professional culture of specific responsibilities or role of conduct. As there is no organisation with a membership list indicating the total number of designers, it is difficult to identify the accurate number of the designers in Bangladesh. Thommessen (Thommessen, 2003) noted that the strength of a design industry can be identified by: number of designers working in the design profession, type of business strategies for using the design for

business benefits and how they succeed in competition, grading of education and number of students they attract, number and level of working opportunities after education. He suggested that, as designing for the international market needs proper knowledge and understanding of that market, western designers are suited to design for the customer of the western countries.

Thirdly, they noted the limitations of design education: there are no master's level education facilities in the design area in Bangladesh, and no evidence of PhD or MPhil level research in the country. Finally and most importantly, process based design language is not yet familiar in the design field of Bangladesh. Concepts like 'design management' or 'strategic design' seems still largely unknown. But design knowledge which deals only with design as a 'form' cannot contribute to business profit without the knowledge of strategic design.

Fourth Banu L. S. (Banu, 2009) noted that, reconceptualization of 'design as form' to 'design as process' requires "fundamental cultural shift that promotes design as an innovative and local problem solving discipline with transparent standards. Cultural negotiations, between tradition and innovation, are necessary in order to incorporate design thinking in the process of cultural production, traditionally considered inviolate."

2.6.1 Developing Design Education within Bangladesh

Currently in 2011 (BHB, 2011), manpower of about one million hand spinners, weavers, dyers, embroiderers and artisans are engaged in this textile craft industry of Bangladesh that produces around 620 million meters of handmade fabric annually. More than 0.3 million hand-looms are active that produce 63% of the local fabrics for local consumption and meet 40% of the local fabrics demand. Moreover, with 50% female worker, this industry provides employment opportunities to a million of rural people. In addition, another half a million of people are engaged indirectly with this industry. It contributes above Taka 10 billion (Taka = BGP 132.30, last updated 08/05/2012 (sonali-bank, 2012)) annually to the national revenue.

The involvement of significant number of women is noticeable in the craft sector and this plays a vital role in creating a gender balance for productive workforce, especially in developing countries. In addition marginalised talented workers, who are usually relegated to the informal sector of the economy, can contribute in formal national economics by working for the textile craft industries. Moreover, there is a two-way relationship between the education system and the creative industries, where education is responsible for turning out individuals with skills, whereas creative industries provide the cultural and artistic inputs in the education system; in the long term, this helps to build a more culturally aware population.

2.6.2 Formal Design Education

2.6.2.1 Bangladesh University of Textiles

Bangladesh University of Textiles is the only one Government University offering 4 years course of bachelor degree in Textiles. In 2010, the university established, which was formerly a college called College of Textile Engineering and Technology. The department of textile fashion and design, textile management engineering is providing degree in the area of textile design and management. As mentioned in *The Textile Today*, this institution has plan for offering degree in Master's and PhD and create research opportunities (The Textile Today, 2011).

2.6.2.2 The BGMEA Institute of Fashion and Technology

The Bangladesh Garments Manufacturers Exports Association (BGMEA) has opened this institute in 2000, which offers 4 years bachelor degree. With the aim to provide basic skills in designing and making apparel, it offers two courses: B.Sc in pattern cutting and design, and B.Sc in garment manufacturing management (Farid, 2007).

2.6.2.3 The Shanto-Mariam University of Creative Technology

This is the first private university (established in 2003) offering education in art, design and computing. This university has been established by Bangladesh Institute of Art, Design and Technology (BIADT) and Shanto-Mariam Academy of Creative Technology (Farid, 2007).

2.6.2.4 BRAC University and DTC

As mentioned by Farid, advisor Syeda Sarwat Abed of Aarong has a plan to start a design education at BRAC University. It might be done in collaboration with Design and Technology Centre (DTC) or with FIT (Fashion Institute of Technology, New York) as a potential partner. Moreover, DTC started a joint project with Dhaka chamber of commerce and The German Technical Corporation (The GTZ) (Farid, 2007).

2.6.3 Informal Design Education

2.6.3.1 Training or Service Centre

As formal design institutes offer long term courses; short term courses are provided by different training centres to strengthen the design and product development department of the producers (Farid, 2007).

2.6.3.2 Fine Arts

Some of the designers are working in design field having degree from Institute of fine arts, University of Dhaka. But it is obvious that it is a good starting point with the education in fine arts, however it

will never be able to substitute the proper designing education with technical and analytical knowledge of designing (Thommessen, 2003).

In addition to higher education, Thommessen (Thommessen, 2003) suggested followings to establish a proper design profession:

- Design in School
- Design in higher education
- Design in science and technology
- Design in business
- Design in distance education

2.7 Constraints in Educating the Manufacturers

German industrial designer Franz Bauer, who is one of the team leaders at DTC claimed that the concept of design is relatively unknown in Bangladesh. He also mentioned from his experience that he did not see the craft sector as a potential sector as they had to postpone a textile workshop because of lack of interest of craftsman to attend. Moreover, he found it very difficult to reach the craftsman as there is no tradition of using a service centre for further education (Farid, 2007).

Additionally, the designers of DTC pointed out the problems in establishing industrial design discipline in Bangladesh because the Bangladeshi companies expect fast-return and even unwilling to pay for the basic fieldwork and analysis which is a necessary preparation for the actual design work (Farid, 2007).

2.8 General Manufacturing Process of Textile Crafts

As the focus of this study is on woven textile crafts, the following sections describe the techniques and the technologies involved in the woven textile craft manufacturing. Mathews and Hardingam (Mathews & Hardingam, 1993) described general production process of hand woven craft which is started usually by the procurement of dyes, chemicals, auxiliaries and undyed yarn from the ‘bazar’ (please see glossary). The yarns are generally spun in the large spinning mills of Bangladesh or imported from China or India. Then the yarn are dyed in a hank form in a ceramic bowl or in a wooden tub; subsequently rinsed and dried in the day light. The coloration process makes the fabric attractive and offers the customer a wide range of choices which could be done in different stages of the fabric preparation, yarn stage, fabric stage, or could be tie-dyed or printed on the fabric.

The next stage involves winding up the yarns into bobbins, which will be used to prepare the warping beam. The winding is done by a machine called 'Charka', where operational skills are required to wind the bobbin evenly, which is important for producing a good quality piece of fabric. After that, specific coloured patterns of fabric is produced from looms where the weavers get busy in moving the shuttle manually from one side to another and crossing different coloured yarn in a repetitive manner.

2.8.1 Technology Involved in Traditional Handloom Weaving

According to a census, 99% of the handloom industry is owned by the individuals and rest of them are operated by the cooperative institutions or in a partnership basis (Jaforullah, 1999) . However, the major drawbacks of Bangladeshi handlooms are low level of technical development and their low productivity (Knutslie & Thommessen, 2003). The types of handlooms that are generally used in Bangladesh are 'Waist Loom', 'Pit Loom' 'Frame Loom' and the semi-automatic 'Chittaranjan Loom'.

The Waist Loom

The Waist Loom is used by the hill tribes only, which makes special characteristic tribal textiles.

Pit Looms and Frame Looms

Pit looms and Frame looms can be of Throw Shuttle or Fly Shuttle type.

(A) The Throw Shuttle Loom

This is a very simple pit loom which is used especially for making 'Jamdani' and 'Bonsai' sarees. This type of loom usually requires two operators- one to throw the shuttle and another to receive it and throw back. However, one operator can weave if the width of the loom is low.

(B) The Fly Shuttle Loom

Fly shuttle pit looms are most extensively used handloom, as frame looms are comparatively expensive. Fly shuttle pit looms are used to make a wide range of fabric from superfine 'Tangail' to common utility varieties like 'lungi'.

The Chittaranjan Loom (The Semi- Automatic Loom)

The construction of Chittaranjan Loom is almost like fly shuttle frame loom, which is made of seasoned timber. The first constructional difference is the placement of a long length winding device to facilitate the use of long warp usually of 500-600 meters length. The other difference with fly shuttle is an iron wheel attachment which helps battening as well as the shuttle throwing operation. In addition, sometimes jacquard is attached to produce the complicated big design.

2.8.2 Capacity of the Handloom

Generally, a Pit Loom has four yards per day production capacity whereas Fly Shuttle Loom can produce a 'saree' that is 6 yards in length. In addition, the semi-automatic loom (The Chittaranjan Loom) has the daily capacity of up to 18 yards, equivalent to 3 'saree's in a day (Knutslien & Thommessen, 2003).

2.8.3 Quality of Local Textiles

According to Knutslien S. and Thommessen T. (Knutslien & Thommessen, 2003), the gap between the rural producer and the international market is tremendous, and the implication of the term 'quality' is not consistent. From his research, he found that the businessmen have to work hard to maintain the quality, and the major challenges are:

- The quality of the fabric (like colour fastness)
- The quality of work (like sewing)
- Understanding and maintaining size spec

ISO certification is not being considered as important to the small craft business, which may be different in the large business. Similarly, ILO found that there is a need for market quality up-gradation with more emphasis on some forms of standardization along with the flexibility to meet certain market needs (Dunn and Mondal, 2008).

From interviewing owner of Bangladeshi local boutiques, Chowdhury (Chowdhury, 2011) found that though the traders pay for quality fabrics, they often receive fabrics with poor colour quality and low graded cotton which could leave a detrimental effect on the business of local boutiques. In addition, volume of order should be in balance with the capacity to maintain the workmanship.

2.9 Examples of Bangladeshi Textile Crafts

2.9.1 'Dhakai Jamdani'-Derived from 'Dhakai Muslin'

To establish an identity of Bangladeshi local design sector internationally, it is necessary to identify symbolic meaning of its historical content, tradition and culture. Therefore, to serve this purpose, it requires a proper understanding of the local design capacity and production method. However, the goal can be only achieved with compatible industrial adaptation and global appreciation of local technique. In this occasion 'Jamdani' is traditionally significant as a remnant of royal Mughal heritage. It speaks about the cultural conservation and the skills of craftsman (Banu, 2009).

In the discussion of history of Bangladesh textile sector, 'Muslin' is an unavoidable part, which appears as a basic of the 'Dhakai Jamdani'. To produce various weave patterns, a thick thread work is introduced by 'Jamdani' in the base of 'Muslin'. Therefore, 'Jamdani' can be named as 'figured muslin' or 'embellished Muslin' (Sengupta, 2011). Similarly, Else (Else, 1988) agreed with the opinion that 'Jamdani' sometimes referred as 'figured muslin' or 'figured silk'.

2.9.2 Dhakai Muslin

History

It is evident from various folklore, religious text and historical accounts that very fine and delicate fabric was available in Bengal from as far back as first century BC. Regarding Jamdani, Sengupta stated (Sengupta, 2011): "essentially a fusion of the ancient weaving techniques of Bengal which is around 2,000 years old, with the gossamer like 'Muslin' produced here since the 14th century. The Jamdani therefore represents over two thousand years of continuous aesthetic evolution that blends different artistic influences". In addition, in around 300 AD in 'Arthashastra'- by Kautilya, by Ibn Batuta in 14th century and at the end of 16th century by the English traveller Ralph Fitch and historian Abul Fazl, 'muslin' of Bengal was praised for its delicacy. In fact, Mummy has been found covered with Muslin fabric dated 2000 BC in Egypt (Ahmad, 2005). During the Mughal era (16th to 19th century) the major domestic consumers of this delicate fabric were the imperial court, the provincial aristocracy and the local elites. The international market was extended over Spain, Italy, England and France (Datta & Streefkerk, 1985).

Types of Muslin and Origin of the Name

Muslin was named after 'Mosul' -a city of Iraq, through which the Muslin was first introduced to Europe (Sengupta, 2011). As Watson was cited by Craft Revival (The-Craft-Revival-Trust, no date) for its airiness it was named by 'Mulmul Khas' (Kings Muslin) which was the best quality. The second and third quality was consequently named as 'Abrawan' (running water) and 'Shabnam' (evening dew). In addition, in the sequence of superiority 'circular ali' and 'tunzeb' was in fourth and fifth position. Furthermore, among the other categories of muslins of Dhaka 'nyansook', 'nilambari' and 'jungle khassa', were also of considerable beauty.

Quality Level and Making Procedure

As cited by Ahmad (Ahmad, 2005), referring to 'Ruhlm' ('Muslin' is known as 'Ruhlm' in Arabic), the Arab merchant Sulaiman stated in the ninth century A.D. that there was "a stuff made in this country which is not to be found elsewhere ; so fine and delicate is this material that a dress made of it was 3 feet in breadth and about 29 feet in length and may be passed through, a signet-ring."

Moreover ultra-fine quality of Muslin made it so sophisticated that a 50 meters long Muslin could be squeezed into a match box whereas one yard of this fabric weighted barely 10 grams only (Sengupta, 2011). The manufacturing process of ‘Muslin’ and finer special quality of Dhaka cotton which could be ‘Bairati Kapas’ or ‘Photee’ are the reasons of the delicate quality of ‘Muslin’ (The-Craft-Revival-Trust, no date). As cited by Craft Revival (The-Craft-Revival-Trust, no date), Roxburgh stated in his *Flora Indica* in 1832 that, an exceptional spinning and weaving skill was involved in manufacturing of this super delicate fabrics. Moreover, an extremely complicated carding and testing process was required for producing the speciality yarn for producing ‘Muslin’. Furthermore, a certain level of humidity along with a particular level of temperature was absolutely essential. Therefore, the spinning of the yarn was done in the early morning or late afternoon, when the air contains maximum moisture. The spinners were the young women, between the age of eighteen and thirty of certain families around Dhaka who had acquired their extraordinary skills over the generations.

2.9.2.1 ‘Dhakai Jamdani’ or ‘Jamdani’

The Uniqueness of ‘Jamdani’

‘Jamdani’ is unique mainly for two of its characteristics. Firstly, the consistent and distinctive motifs which are inspired by Iranian motifs and secondly, for the supreme delicate look of the fabric made by introducing motifs on a transparent base mesh. Though the motifs used in ‘Jamdani’ has an abstract look but it is originally creative transformation of elements of the nature like leaves, flowers, animals (Sengupta, 2011). Though the construction of the handlooms used for manufacturing ‘Jamdani’ is simple, the production procedure is extremely labour-intensive (Khan, 2010).

Technology Involved and Expertise of the Producers

Weaving ‘Jamdani’ is like a “tapestry work” (Khan, 2010) that can be termed as a loom embroidery work where every single thread is drawn with a wooden needle and placed by hand, illustrated in Figure 2.2. The short weft threads are passed by making loops and knotting with the warp to make a complete motif. These joints are so neatly tied to make it invisible, although there may be several in a certain motif (Banu, 2009). The only difference of the tapestry with ‘Jamdani’ weaving is that instead of shuttle or ‘bobbin’, short length of design threads are tied with the warp by using tamarind wood or bamboo needle called ‘Kandur’.



Figure 2.2 'Jamdani' Weaving (Mustafizur, 2007)

Though most of the 'Jamdani' producers are illiterate or semi-literate, however they are so expert in weaving 'Jamdani' that they do not need any help to calculate exact number of times to repeat a certain stitch or sketch for producing a certain motif, which needs extreme concentration (Sengupta, 2011) and dexterity (Banu, 2009; Khan, 2010). This phenomenon is due to the pattern with very specific formation of motifs that have emerged over time (Khan, 2010).

Machines and Materials Used for Weaving 'Jamdani'

Throughout Bangladesh, weft faced, horizontal or low warp looms are generally used by the hand weavers that vary in technical advancement from single heddle to semi-mechanised Jacquard looms. Exclusively hand spun, naturally dyed cotton or silk yarns were used to be the raw material for 'Jamdani' which has now replaced by machine spun, synthetically dyed cotton, rayon and silk. In addition, application of silver, golden or coloured yarn is preferred for this purpose (Khan, 2010).

End Use of 'Jamdani'

During Mughal era (16th to 19th century), 'Jamdani' was extensively used as 'Angarakhans' for both men and women, and at that time it was used in women's dress capitals of fashion in Europe's (Khan, 2010). Now a days it is extensively used as 'Saree', as well as for making dresses, and recently limitedly used for home decorations and curtains (Sengupta, 2011).

Decline of Jamdani Industry and Present Condition

From fifties the declination of the 'Jamdani' industry has accelerated due to the rapid industrialisation of textile sector as well as import of cheap low quality yarn in a large scale, which originally started after the Mughal Era (Khan, 2010). At present, the major problem is that the actual weavers are deprived of the net profit where they get a wage which is as low as 60 USD and 20 USD

per month for a senior and junior weaver respectively, and major part of the profit goes to the middleman (Khan, 2010).

The government has started taking measures to recover from this situation such as making direct contact with the weavers, establishment of a 'Jamdani' production centre called 'Jamdani Palli'. In addition, some of the designers and public or privately owned craft product outlets like 'Aranya', 'Tangail Saree Kutir', 'Aarong', 'Kumudini' are working to preserve and promote this global artistic inheritance. However, few individual designers like Rubi Ghuznavi are experimenting on product development for transforming 'Jamdani' into other clothing materials (Khan, 2010).

2.10 Conclusion

This chapter has reviewed the terms 'craft' and 'craft production', the role craft has to play in developing economies and for Bangladesh. The literature reviewed for this chapter has identified that the textile craft sector is of economic and social importance to Bangladesh and has also identified the importance of entering the international market for the crafts sector to compete. The literature identified the problems of competing within the international markets and identified government and private organisations that aim to help develop competitive competencies within craft producers.

CHAPTER 3 - DISTRIBUTION CHANNEL AND COMPETITION ISSUES

3.1 Introduction

This chapter examines issues surrounding the incorporation of Bangladeshi textile crafts into a global supply chain. This chapter provides a definition, structure and general activities of the supply chain for textiles. The global sourcing strategies of the industrial textiles and apparel companies are reviewed and examined to identify key sourcing issues relevant for the textile craft sector. Factors that influence the buying decision are presented to examine the implications for textile crafts production. The textile craft supply chain is examined to identify key issues relevant to the craft worker pursuing export sales and some examples of 'routes to market' are presented from the literature. The chapter concludes with a discussion about the constraints for exporting textile crafts of Bangladesh, the benefits and risks in absorption into a global supply chain and identifies the policies and support activities for textile crafts.

3.2 Supply Chain Definition

Hinkelman (Hinkelman, 2005) defines supply chain as "the series of physical facilities, equipment, management and technology that supply goods or services from source to ultimate customer". For goods, supply chains generally consists of manufacturing plants, transportation, warehouse, distribution centres, sales location such as retail shops and/sales methodologies such as Internet websites, computer system and software. The processes and links among these facilities are subject to great change such as websites and computer software are used now to record and process inventory information, sales data and online order, which was not done before.

For products, supply chain means designing and performing processes, through which a firm collects, converts and transports products from source to the market with added value, whereas for service firms, it means designing and performing processes by a firm to "configure and mobilize its offerings to the market". Supply chains could be of various forms to serve different purposes (Cavinato, 2000).

3.3 The Value Chain

A concept within the supply chain literature is the "value chain" which has been defined as a "range of activities involved in the design, production and marketing of product..." (Gereffi, Memedovic, & Organization, 2003). The emphasis of examination is how the chain enables value addition to occur. A typical clothing and textiles value chain is organized into five parts; raw material supply (including natural and synthetic fibers), provision of components, production networks of garment factories, export channels by trade intermediaries and retail marketing networks. Progressing from one set of

activities to the next requires some value adding activity to make the process profitable. This is most simply illustrated in figure 3.1 by Cuc and Tripa (2008).

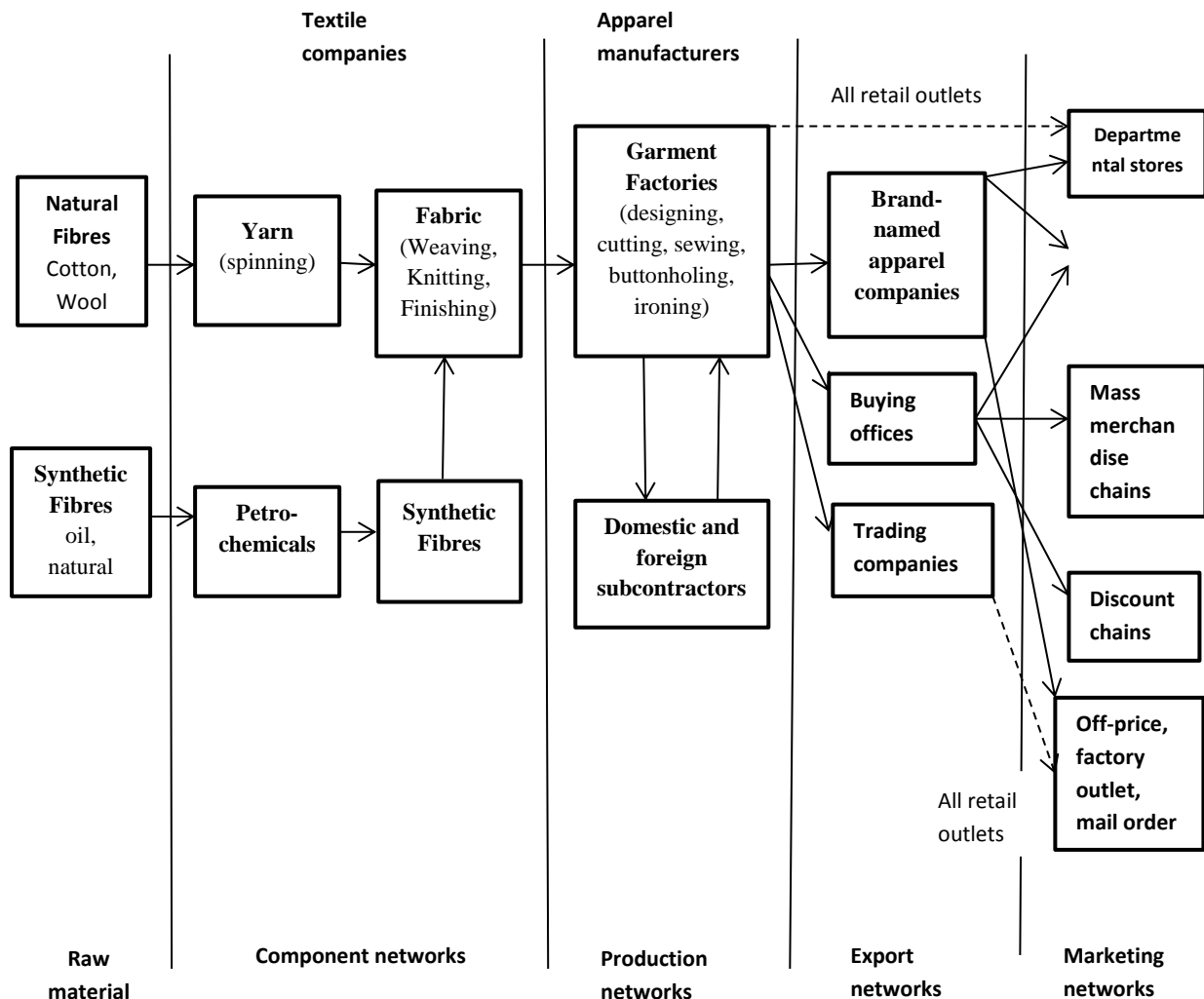


Figure 3.1 The Apparel Value Chain (Cuc and Tripa, 2008).

As mentioned above, the value chain relies on a network of producers to achieve profitable products. These economic networks can be classified as either 'buyer driven' or 'producer driven' (Gereffi, et al., 2003).

- (i). Producer driven value chains are large, where producers play the main role in coordinating manufacturing network including both the forward linkage (e.g. distribution and retailing) and backward linkage (raw materials and components supply). Generally, capital intensive and technology intensive industries are good example of 'producer driven' value chain such as automobiles, heavy machinery, aircraft, computer, semi-conductor industries. Scale,

volume and technological advances make the profit in this type of supply chain (Gereffi, et al., 2003).

- (ii). 'Buyer driven' value chain large retailers, branded manufacturer and marketers play the key role in setting up a decentralized sourcing network in different exporting countries. This type of supply chain is more labour intensive and common in consumer goods industries such as apparel, footwear, toy, consumer electronics, and handicrafts. Combination of high value research, design, and marketing brings the profit by linking overseas factories and traders. The products requirements and specifications are made from the big buyers end, and those are made and imported from the third world contractors. Japan in 1950s and 1960s, East Asia in 1970s and 1980s, and China in 1990s grew their economy by exporting through buyer-driven value chains. Retailers like Walmart and JC Penney, athletic footwear companies like Nike and Reebok, and fashion-oriented apparel companies like GAP are good example of 'buyer driven' supply chain.

3.4 Global Sourcing Strategies

In order to understand how textile crafts may be sourced for entry into a global chain, it is important to understand sourcing strategies. Sourcing is a traditional term that covers the activities performed to acquire materials and or finished goods and is important in the contexts of understanding the mechanisms of entry into an international market (Kunz and Garner, 2007). Sourcing can be the process of determining a country and or firm with which to do business with or determining the most cost efficient vendor of materials, production and or finished goods at the specified quality and service level with delivery within a specified time frame (Kunz, 1998).

Sourcing requires understanding and expertise in a mix of marketing, merchandising, production areas of specialization as well as global marketplace issues. Sourcing may consist of acquiring specific operations (such as technical services) or it may be a range of operations that take place in a country with a lower wage rate.

Sourcing decisions are complex but consist of mainly the following: costs, production capacity, quality, timing as well as availability of materials for the appropriate styles. To give an idea of the complexities, the two critical issues in sourcing decision-making are:

Costs of a product = cost of raw materials + labour + agent/broker fee + quota/tariffs + insurance + transportation + receiving and quality assessment costs.

Production capacity = output capability of the plant/machinery/work centre in a given period of time.

Two major sourcing strategies are in place by lead firms of the 'buyer driven' value chains (generally the retailer): 'third party sourcing agent' 'direct sourcing' and the 'overseas sourcing office'.

3.4.1 Third Party Sourcing Agent

Buyers purchasing small volume, or need to place a small quantity to order, prefer third party sourcing agent. Pioneered by Li & Fung, this model relies on communicating with the manufacturer to convey the information obtained from the main buyer. Third party sourcing firms and their clients build up and maintain a long term close relationship based on the mutual trust. Third party agents charge a commission for the manufactured goods received by the lead firm. In this researcher's own experience of working in a third party sourcing house she has seen third parties commission is 4-8% on FOB price.

Advantages of this model are: volume of order according to requirement, flexibility and ability to spread risk among suppliers. Li and Fung became more prominent as a primary sourcing for giant retailers like Walmart and famous apparel brand like Liz Claiborne (Gereffi & Frederick, 2010). These sourcing agents have their own offices in various countries all over the world to source for different buyers. The main criteria to evaluate a potential third party sourcing firm are mainly established on cost, quality, capability, and how extensive the third party's range of service is, how wide geographic area it covers, how much specialised team it has. Other criteria may also be considered are flexibility, responsibility and creative problem solving capabilities for tackling unexpected situations (Núñez-Carballosa & Guitart-Tarrés, 2011).

This model has particular repercussions on the small craft makers. The relationship between the small firms and the large distributors is a mixture of tension. On the one hand, there is an asymmetric competition and bargaining between them that result in the undervaluation of talent of small distributor. On the other hand, large distributors cannot ignore the rich source of new creative talent of the smaller distributors (UNCTAD, 2010).

According to the Bangladesh Garments Manufacturers and Exporters Association (BGMEA), international buyers generally communicate with the manufacturers through a third party who encourages them to source products from Bangladesh. This third party and the buyer negotiate an agreement which is that the firm will take responsibility to deliver products according to the buyer's specifications. These types of firms are known as 'buying house' in Bangladesh (please see glossary at the end of this thesis). On behalf of the international buyers these buying houses place orders to the manufacturers (Prothom-Alo, 2010). It is difficult to assess how many buying houses there are within Bangladesh. Reports vary between 1000 at Bangladesh Buying House Association (BGBA) (Mirdha, 2008) , through 988 at BMGEA (Prothom-Alo, 2010), to 5,000 (Fahad, 2011). The problems in counting the number are compounded by

reports that around 200 buying houses spring up in every five months in Bangladesh (Mirdha, 2008). That there is a great deal of interest in Bangladesh fabrics is demonstrated by the fact that major retailers such as Hugo Boss, Adidas source apparel, while S. Oliver, Esprit, DKNY from USA, Tommy Hilfiger source high quality and high value products which raises the notion that textile crafts may be viable product for them. Apart from Europe and America, a good market is developing in Japan as well, with big brands like Marubeni, Uniqlo (Ahmed, 2010).

3.4.2 Direct Sourcing

As the buyers develop expertise in assessing local capabilities, many of them started to establish direct overseas sourcing offices in their main manufacturing countries to cut the cost of third party agent commission and to mitigate risk. Over the years, depending on the cost and skill level of the staffs in direct offices, buyers have been shifting their responsibilities to these direct offices, and some of them also established some design and product development offices closer to manufacturing offices. Major buyers tend to establish their own direct sourcing offices in Bangladesh, (Gereffi & Frederick, 2010). Where buyers have been able to assess the local capabilities they have started to establish direct sourcing relationships to dispense with the costs of the third party agent costs. They have developed *overseas sourcing offices* in their main producing countries.

3.4.3 Overseas Sourcing Office

Buyers typically require manufacturers to react faster and better understand the retailer's needs. High-volume chains like M&S, Tesco, Wal-Mart, Next, H&M, Linmark, PVH, Carrefour, JC Penny, Zara, Mother care, C&A etc. have developed their own offices in Bangladesh and to sources directly from the suppliers of Bangladesh. In order to make goods, information and payments flow smoothly, a number of logistics and business services are active between this distribution centre and the buyer. Retailers have also begun to develop more product development/design offices closer to manufacturing as they require faster reaction times to fashion trends and better understanding of their needs. This compounds the barriers set up for those wishing to enter the global supply chain as the leading suppliers are also developing further their technical capabilities to strengthen their supply chain relationships.

3.5 Key Sourcing Issues

Burns and Weiner identified that the factors which are considered first while choosing a sourcing partner or region are- cost, quality and lead time, (Burns & Weiner, 2011).

3.5.1 Price Competitiveness

'Cost' is the high entry barrier for the new firms, as profitability is the greatest concentration of value chain market (Gereffi, et al., 2003). As this is a labour intensive industry, labour cost in apparel

supply chain is a significant part of the total cost which results in this business being located in the lowest paid countries such as Indonesia, Sri Lanka and Bangladesh (Gereffi, et al., 2003). According to The Guardian (Guardian, 2010), the official minimum wage of the garments workers in Bangladesh has been raised by 80% after the first rise to Tk 3,000 (£28) per month from Tk 1,662 (£15.5) in 2006. This new pay structure implemented from November 2009 with seven grades, top pay of Tk 9,300 (£87). The rise in labour wage will affect the product cost, however will motivate the employees and help to build up a sustainable business environment. Additionally, a number of buyers in the apparel industry have started direct sourcing recently from Bangladesh. In this way Bangladeshi manufacturers will be able to get profit 15-20% more (Ahmed, 2010).

3.5.2 Lead Time

The lead time refers to the time required to reach the ordered product to buyer after placing an order. In the 1980's, this was 120-150 days but is now 30-40 days. Within Bangladesh, however, suppliers can offer lead time of 90-120 days and 50-60 days respectively for woven and knit products, whereas Chinese suppliers offer 40-60 days and 50-60 days, Indian offers 50-60 days and 60-70days for those items respectively (Haider, 2007). Reducing the total lead time is crucial for the Bangladeshi apparel industry to remain attractive and competitive in the global market (Ahmed, 2010).

3.5.3 Quality

The concept of quality is multidimensional (Klerk et al, 2004). Yoon and Kijewski (Yoon & Kijewski, 1997) defined the product quality as a level to which the product meets the requirements of a consumer. For an apparel product, it may be the objective or mechanical qualities which are related to the technical aspects. On the other hand, the qualities of a product are sometimes related to emotional or symbolic things (Klerk et al, 2004). In buying decision making process; the sensory, emotional and cognitive dimensions of a product have a great influence. In addition, the design and materials of a product show aesthetic side of the apparel mostly. Specially, colour and design has great influence on the aesthetic dimension of apparel products. The buying decision process mainly depends on two factors: product complexity and commercial uncertainty (Fisher, 1976). More adaptation is required for products with higher potential for post-purchase problems. Consequently, more disciplines will be involved in the buying decision process and the process will be more complex.

3.6 Supply Chain for Textile Crafts

In today's global economy craft products are available to the end customers all around the world through integrated industrial supply chain. UNIDO and UNESCO (UNIDO & UNESCO, 2007) has

identified few key factors for the successful establishment of craft products in international market. Firstly, the degree of preservation of tradition and cultural heritage of a certain community is the heart of a craft product. Secondly, selection of local eco-friendly raw materials is important during designing the product. Thirdly, the level of skills of the artisan is essential to attract a customer of a craft product. Fourthly, promotion, marketing and distribution are necessary for successful business growth. Finally, the demand in the target market is required.

3.6.1 General Structure of the Supply Chain for Textile Crafts

General structure of a supply chain of craft industry (UNIDO & UNESCO, 2007) is illustrated in Figure 3.2. The three major elements of this supply chain- inputs, manufacturing and marketing are placed at the top of the supply chain structure, and the support policies and service required for effective operation of the supply chain are placed at the bottom. Figure 3.3 illustrates a typical supply chain for hand woven textiles (Zhang et al, 2011).

3.6.1.1 The Inputs

In a craft supply chain, pre-existing elements such as history, cultural heritage, tradition, raw materials are required along with the local human resources who are skilled with available local technologies. Continuous innovation and entrepreneurial skills are also essential elements together with the availability of information technology, infrastructure and basic raw materials for production.

3.6.1.2 Manufacturing

Variety of local raw materials and the availability of the technology for pre-processing is one of the major components of the total manufacturing process of the craft products. For example, spinning technology is required along with the availability of raw cotton for the establishment of craft textile industry based on cotton fabric weaving.

3.6.1.3 Marketing

Marketing is the most crucial component of a supply chain that needs continuous feed of the market information. Local or tourist market is the target at the initial stage of the industry, which can go forward to the export market as it develops. Marketing mechanisms like arrangement of trade fairs in national and international specialised stores and establishment of craft exhibition centres, introduction of E-commerce system can be applied to this sector.

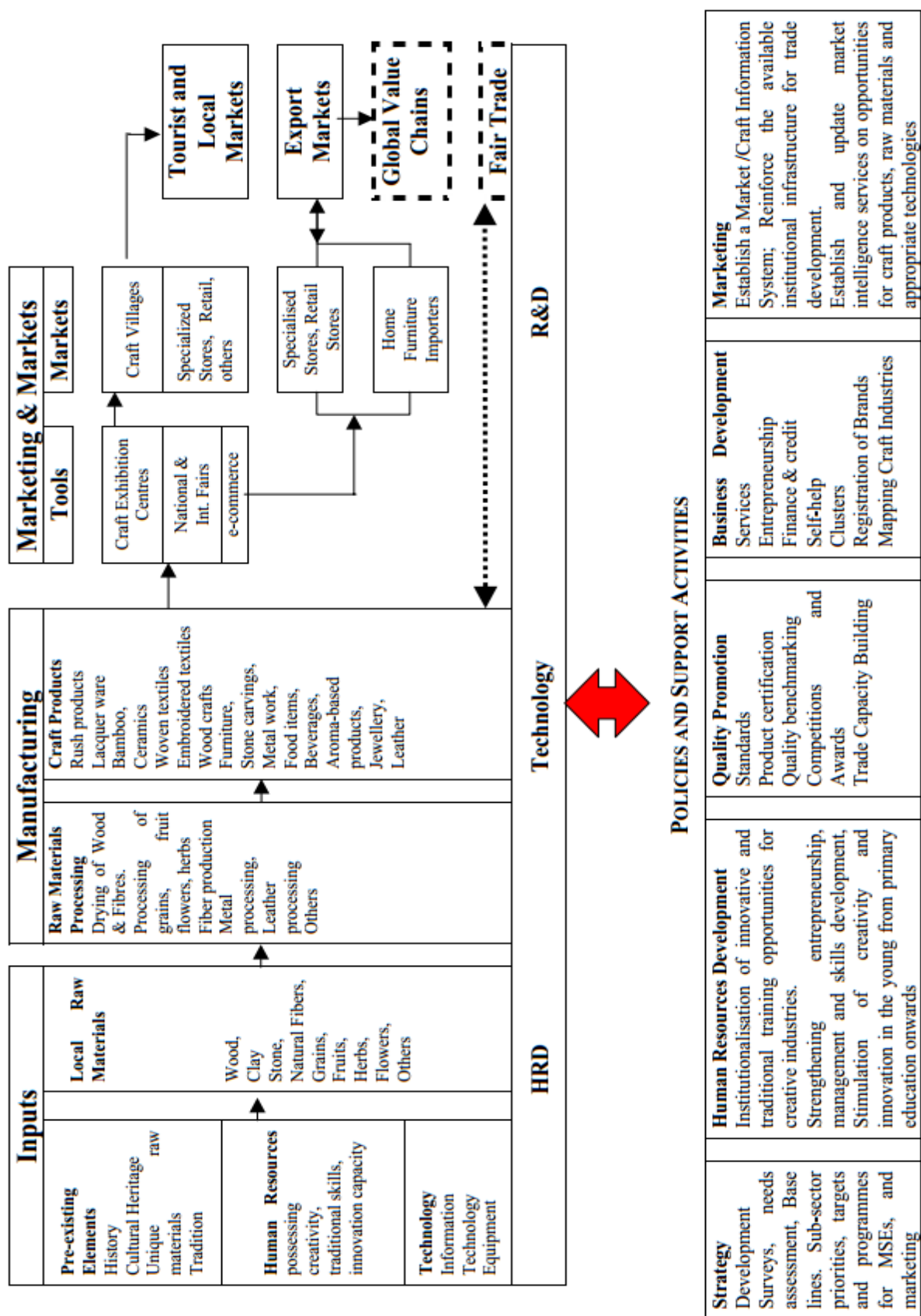


Figure 3.2 Elements of Supply Chain in Craft Industry (UNIDO & UNESCO, 2007)

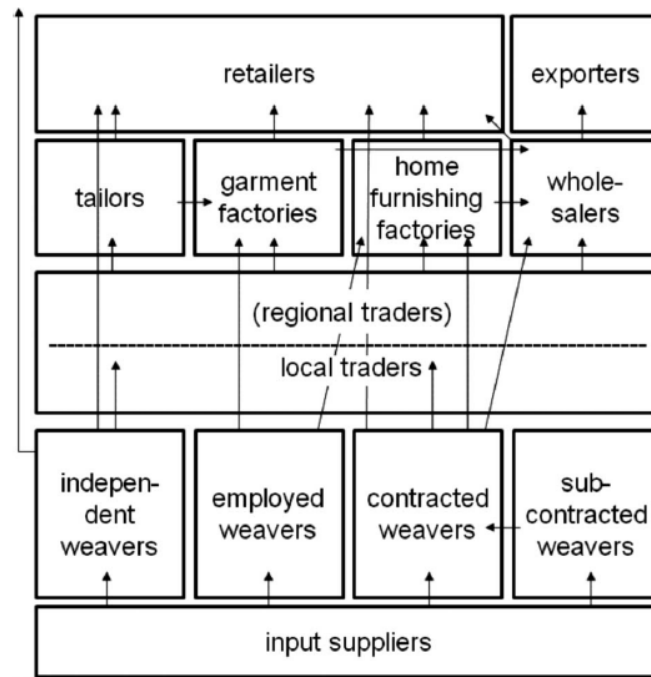


Figure 3.3 Elements of the Supply Chain in Handloom Weavers in Egypt (Abdellah and Ayele, 2007, in Zhang et al, 2011, p. 1878). The Inputs Include Fibre Suppliers, Yarn Suppliers, Dyers, Spinners, Machinery Suppliers, etc.

3.6.2 Craft Production Systems

In order to produce to the required quantities for retailing, the production system has to be considered especially for craft producers who are mainly small to micro-enterprises.

Edwin Hunley's PhD research in 1984 observed two production systems for the production of Kassala knives and swords: complete make through or organised production system (Hunley, 2010). *Complete make through* is that of a single product from start to finish, the producer is skilled in all aspects of the product's manufacture. The product usually takes longer time to make and is often of higher quality and thus cost and each item is unique (Hunley, 2010). *Organised co-ordinated production* is a system where a product is broken down into component parts and the several craft producers collectively make the product – each specialising in making a part of the product. The product is made in a shorter amount of time, thus more can be made to meet customer demand, each producer is paid per piece, and the products are cheaper.

Whichever method of making is adopted, craft production with export aspirations tends to be conducted through "clusters" or "networks". A large amount of literature examines cluster formation and its successes and failures and has been of interest to academic researchers since the 1970's (Basant, 2002). There is no one specific definition of the term 'cluster' however it may be understood to be a "large group of companies in related industries located in a specific region" (Swann and Presever, 1998, cited in Basant, 2002, p. 6). The implication of this is that there are a

large number of organisations with similar processes and products linked through their tools and technology.

Clusters may be based on technology or geography. The advantages of being in a cluster have been recorded as: reduced transaction costs due to larger volume orders, greater access to market due to increased production volumes and greater innovation through improved and quicker problem solving and faster response (Basant, 2002). The literature reviews of craft clusters have raised a number of issues pertinent to craft production and access to export markets.

Clarisse Beddig's description of a handloom weaving cluster in India highlights that the success of a cluster dependant in equal parts on events within and outside of the cluster – i.e. the business environment (Beddig, 2008). This is similar to Zhang et al's observation of the positive impact of infrastructure (eg access to finance, electricity, transport, etc.) on handloom products in Egypt (Zhang et al, 2011).

Conditions for knowledge acquisition is are also important for clusters to be successful –as upgrading on process or technology knowledge is important to remain competitive. This requires firms to interact with each other to develop a strong knowledge base. It is mainly in the developing economies that the weak knowledge base prevails – firms are mainly informal, unable to attract new sources of growth capacity and interactions between enterprises are fragmented and limited and extra cluster linkages are mainly non-existent.

Where global value chains are concerned, the clusters are usually co-ordinated through arm's length relationships wherein buyers and suppliers are not close. As stated earlier, cluster firms need to upgrade knowledge and process efficiencies – either through collective efficiency approval or as part of a global value chain. In the global value chain, the relationship with the buyer is usually hierarchical – the lead firm taking responsibilities for certain areas of production and therefore taking a management role in production. In some instances there is a quasi-hierarchy co-ordination mode where power lead firms integrate and co-ordinate the nationally dispersed activities; this governance enables them to exercise a crucial role in determining the upgrading opportunities for individual firms and therefore clusters. The consequences are that firms and, or, clusters specialise in a narrow range of functions which is often labour intensive and low value added or income; this is often compounded by their exclusion from activities related to or an understanding of the higher value addition areas such as product development, marketing or branding (Beddig, 2008).

The textiles and garment industry are the first industry that a developing economy tends to rely upon for attracting foreign direct investment initially; however, this can be dangerous especially

when it is the single industry that is relied upon thus. This was so with Cambodia which relied upon the garment industry and, as the global financial crisis took place, during 2009, it was estimated that 20% of the workforce had been made redundant. Bangladesh, although still relying heavily on the garment export industry, it has developed and built upon domestic capabilities, exerting more local control over backwards and forward linkages, exhibiting more producer driven tendencies and thus enabling Bangladesh to fare better (Keane, 2012).

3.6.3 Routes to Market for Craft Products

The craft industry, globally, is driven by individual projects, such as development projects run by the government or external international funding or NGOs (UNCTAD, 2010). The craft producers are mainly small and medium sized enterprises (SMEs) (Kamara, 2008). This phenomenon of the craft industry (Kamara, 2008) is especially true for the developing countries where there are few large scale enterprises available, and these industries are mainly dependant on a large number of small enterprises, for example, it is estimated that there are currently 66,891 small industries and 6,16,470 cottage industries in Bangladesh (BSCIC, 2011).

Craft products may be sold to the final consumer through “numerous actors involved in transfer of goods from producer to final consumer” (Brooks et al, 2010, p.1003). Mathews and Hardingham (1993) identified two routes to market for craft products: Middleman Selling and Alternative Trading Organisations (ATO).

3.6.3.1 Middleman Selling

This usually begins with a (normally) male member of the family, who goes to the ‘bazaar’ (local accumulation of shops) to sell products directly to the traders. Sometimes middlemen or mobile merchants buy the products and sell them to the bazaar or to another middle man who will travel and sell it to a wholesale market. In this case the middleman gets maximum benefit not the producer. From the central wholesale market, products are distributed to the retailers, from where it goes to the shops all over the country (Mathews & Hardingham, 1993). An example of this is the case study of swords and knives making in the village of Kassala in Sudan as described by Edwin Hunley (Hunley, 2010). The knives and swords made were initially sold in the local market but not in the numbers required for a living wage. A system developed of merchants who employed between five to seven sellers, who were travelling sales people. The merchants were allocated territories in which to sell to and they in turn allocated town to their sellers to sell the knives into. Each seller was given a consignment of between seventy-five to one hundred knives and these were either bought in cash by the seller or on credit. The credit was recorded by the committee of the

marketplace (the Suq), although the seller repaid the loan to the merchant not the committee. This is illustrated in Figure 3.4.

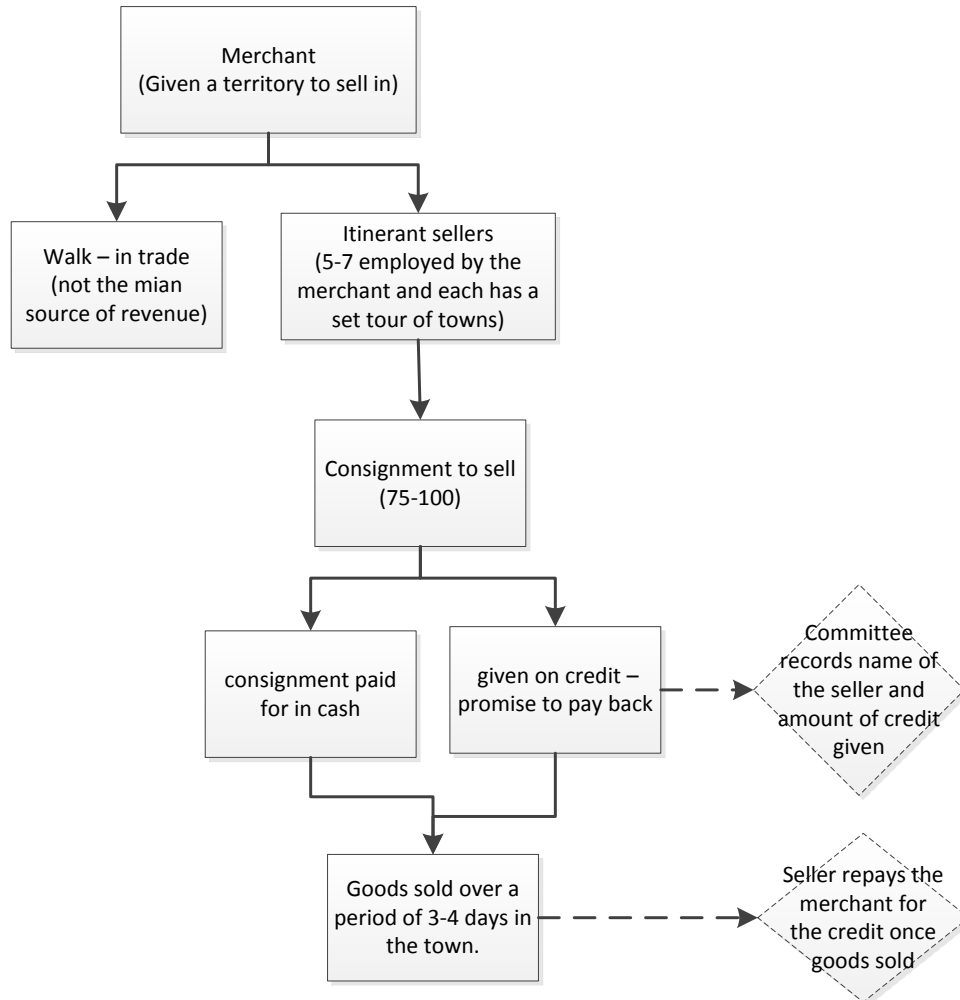


Figure 3.4 Route to Market for Kassala Knives and Swords (According to Hunley, 2010)

3.6.3.2 Alternative Trading Organisations (ATO)

In the Alternative Trading Organisations (ATO) system, the producer reaps maximum benefits, as there is no middleman to take a share of the profit. Moreover, the ATO's help them by providing loans, design, pattern, colour selection and technical supports. In addition, the ATO's promote the craft products to international customers also (Mathews & Hardingham, 1993). Wolfe (Wolfe, 2004) described how ATO's could develop mechanisms for this to take place. She described that a collective action by the International Trade Council (ITC), the World Trade Organisation (WTO) and the United Nations Conference on Trade and Development (UNCTAD) led to a drive for Export

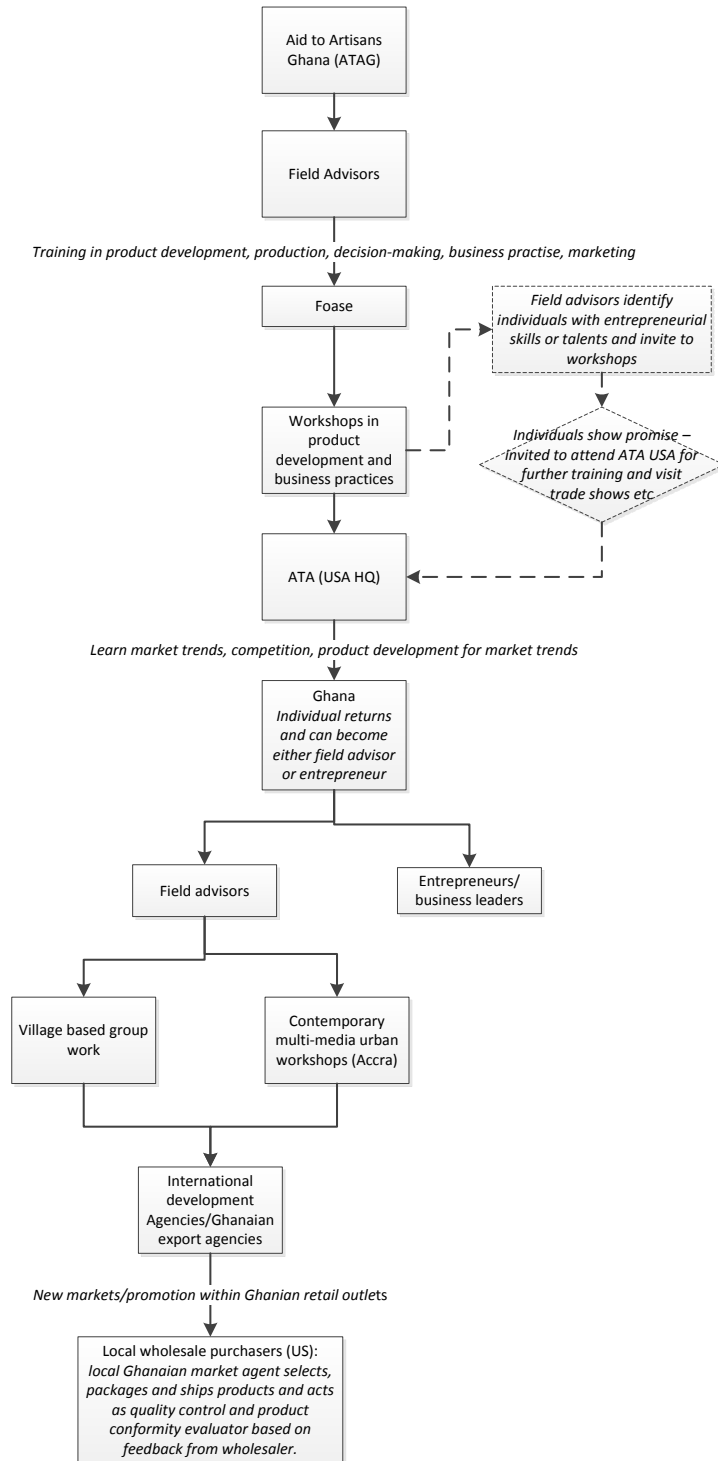


Figure 3.5 Routes to Market for Wood Carvers in Foase, Ghana (from Wolfe, 2004)

Production Villages (EPV), as part of the ITC's export led poverty reduction programme. The case study of a successful EPV in Ghana presented the routes to market for the wood carving village of Foase (Wolfe, 2004). Aid to Artisans in Ghana (ATAG-a local branch of the Aid to Artisans with headquarters in USA) provided support and assistance to the wood carvers through training local people to develop businesses and knowledge of working with international buyers; illustrated in

Figure 3.5. After gaining training and attendance at trade shows in the USA, the individuals returned to Ghana with market information and trends, thoughts about new products to develop for an international market and they could then become business leaders – motivating other crafts producers to develop or field advisors for ATAG where they worked with local production groups to give training that they had received. The field advisors could do this either in the villages or in the main cities such as Accra where the effort was develop links and contacts with agencies that could help in liaising with the international buyers (wholesalers). The local Ghanaian market agents thus became the quality control and product conformity advisors, aspects that are still of particular importance to the customer (wholesaler).

Few textile craft exporters in Bangladesh have been identified from the literature reviewed (Hopkins, 2000). Those who do, export various jute products such as mobile phone bags, vanity bags, shopping bags, mats. Those Bangladeshi textile craft manufacturers who are involved in exporting mainly supply NGOs or ATOs. For the production of their craft products, these enterprises generally run large number of production centres located all over the country. For export purposes, these enterprises had developed their own network system to communicate with international buyers and promote their products in international market.

Jute product exporters include JPDC, Action Bag and Heed. JDPC, have developed their own supply chain in export market, and work to promote mainly jute products (Sarker, 2011). Action Bag and Heed Handicrafts have supplied a range of jute products to Oxfam Fair Trade for decades (Hopkins, 2000). Oxfam is providing them assistance to develop new product like toys and garden tidies, and have recently introduced materials like heavy cotton that has similar properties. Generally, Heed exports 64% of their total products which consist of core and seasonal design (Hopkins, 2000). 90% of their export product is designed by their own design team which receives on job training on product designing from Oxfam (Hopkins, 2000). Heed exports mostly to the ATOs based in the UK (sales of \$163,529 in 1999/2000), USA (\$70,592), Netherlands (\$70,566) (Batchelor & Webb, 2002), Australia and Asia (Hopkins, 2000).

BRAC is one of the largest development organisations in Bangladesh with a manpower of 120,000 and annual turnover of US\$ 535 million, which was established as a small-scale relief and rehabilitation project (Rogers, 2009). BRAC developed Aarong as a sustainable handicraft and fashion brand providing employment to 65,000 artisans in 2,000 villages across Bangladesh, as well as 25,000 independent cooperative groups and traditional artisans also selling their crafts based products through Aarong. Aarong has been exporting craft products particularly textile craft products to Europe, North America, Asia and Australia through its own retail shop in London; these

include: household, gift and fashion products based on materials like hand-woven silk and cotton, endi, terracotta. Their main customers are expatriate Bangladeshis and the souvenirs for foreigners (see Appendix 13 for Aarong promotional literature). The process flow of Aarong has been illustrated in Figure 3.6.

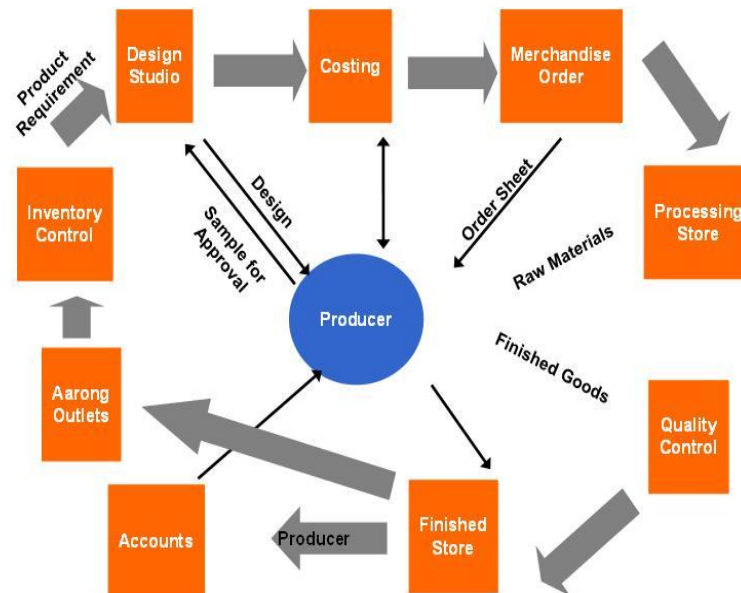


Figure 3.6 The Process Flow of Aarong (Aarong's Promotional Literature)

The Ministry of Textile and Jute of Bangladesh government (Sarker, 2011) is working to establish linkages for sharing business information and build networks between commercial foreign buyers and the local craft enterprises. Although there are pockets of successful E-commerce experience, the laws and policies about the intellectual property copy rights (a major asset of the creative sector) are not strong in Bangladesh and designs are copied from websites, resulting in fear and barriers to public promotion and e-marketing (Batchelor & Webb, 2002).

3.7 Major Craft Importers and Products

Largest craft product importers of the world are the European Union, the United States and Japan.

3.7.1 The EU Market

The largest craft importing market is in the EU, in decreasing order of importance: Germany, UK, France, and Italy, the Netherlands, Switzerland, Luxemburg and Belgium. In these nine countries woven textile fabric and garments of cotton and silk are at the top of their imported craft product list, enhanced product design and quality improvement can improve the market share. China, Japan, US, Hong Kong and Taiwan are among the main craft exporters to the EU market (UNIDO & UNESCO, 2007). Table 3.2 (Batchelor & Webb, 2002) shows the UK markets of handicrafts sector.

Table 3.1 UK Market of Handicrafts Sector (est. 2001)(Batchelor & Webb, 2002)

Home Furnishing Sector	Example of Products	UK Market (2001 est)
Window Dressing	Ready-made curtains, accessories, blinds (fabric, wood, plastic, bamboo)	£1,790m
Bedding	Duvet covers, sheets, pillowcases, blankets	£1,580m
Bathroom Textiles	Towels, bath mats	£580m
Cushions and covers	Cushions and covers	£250m
Table Linen	Tablecloths, napkins	£40m
Total Home Furnishing		£4,240m

3.7.2 United States

The US market customers prefer handicraft products made from natural materials that have worn look and aged finish or imperfection of handwork but not necessarily eco-friendly products, which are more popular in Europe. Craft products are sold in the US through two major retail channels: independent speciality retailers, which have the advantage of scope to serve customer with various taste, income, quality requirement and deal with smaller order quantity and E-commerce (UNIDO & UNESCO, 2007).

3.7.3 Japan

In this market, craft products of Thailand and Vietnamese origin are popular; whereas older women also prefer Malayan and Indian craft products (UNIDO & UNESCO, 2007).

3.8 Categorising Craft Product According to Its Ethnic, Cultural and Historical Adherence and Their Market

With regards to the textile crafts products, UNIDO have developed a characterisation of craft products as an indicator of probable sourcing options available. According to the ethnicity, preservation of traditional elements, production technology, uniqueness, and the market they address, the UNIDO grades the craft products as illustrated in Table 3.2 (UNIDO & UNESCO, 2007).

Table 3.2 Grading of Craft Product According to Its Ethnic, Cultural and Historical Adherence and Their Market (UNIDO and UNESCO, 2007)

Type	Description	Product Characteristics	Price/Volume	Market/Outlet
Traditional Fine Crafts	Ethnic products, works of art produced by an individual master/artisan following the traditional design.	Uniqueness. Ethnic appearance from the national heritage	High-end market. High price-Low volume	Museums, Galleries, Private Collection, Foundations
Artisanal Crafts	Crafts produced using traditional methods. Generally hand-made using traditional raw-materials and technology. The design is historically based, but adjusted to greater volume production.	Ethnic appearance. Historical relevance. Design adapted to reflect national heritage.	Medium to high end market. Medium-high price. Larger volume is possible and planned for.	Specialized stores. Crafts Exhibition. Design centers.
Commercial Crafts	Items made in the traditional manner but adapted to needs and tastes of the buyer market. Foreign professional buyers, designers redesign to adapt products to market needs, highly influenced by trends in fashion.	Ethnic appearance. Design adapted to reflect national heritage.	Low to medium. Price dictated by market demand. Planned for large volume.	Specialized Stores. Life-style shops. Importers. Tourist shops. Craft Exhibition. Mainstream buyers. Design Centre
Manufactured Crafts-Mass Production Crafts	Products manufactured in larger volumes, using machinery and/or larger organized networks of crafters. Crafts are ordered by tradesmen in large quantity, often do not follow tradition. Patterns and designs borrowed from different sources.	Ethnic appearance. Adapted design to reflect buyer market needs. Accessories to extend other trendy products.	Low to medium. Price dictated by market demand. High emphasis on value of money, as required by buyer market. Well-developed value chain	Mainstream buyers. Global chains. Tourist Shops.

3.8.1 Traditional Fine Crafts

The unique pieces of craft products belong to this group that demonstrate the ethnic and traditional heritage. These works of arts are addressed to high end market, exhibited in museums and art galleries, and usually purchased by collectors and.

3.8.2 Artisanal Crafts

These hand-made products preserve the traditional appearance as well; however the design can be adjusted by a design consultant according to the market requirements ensuring that the ethnic elements and historical background is maintained. These products can be manufactured in large volume for medium to high end market.

3.8.3 Commercial Crafts

Commercial crafts are also designed with traditional look, but the buyers may consult and the products obviously adapt more of the mass market requirements and tastes. The products are produced for low to medium end market in large volume. Usually the number and types of outlets for these products are larger that includes specialized stores and exhibition centres as well.

3.8.4 Manufactured Crafts - Mass Production Crafts

This category of products is produced using machines or networks of crafters and do not adhere to tradition; however they do have an ethnic appearance, using patterns and motifs that emphasis value for money. These products are produced in massive volume for tourist shops and can be connected to mainstream buyers and global chains.

From the literature and table 3.2, it appears that, commercial craft and manufactured crafts-mass production crafts are suitable for exporting for mainstream buyers. Moreover, both of these options are suitable for larger volume and price dictated by market demand.

3.9 Constraints of Exporting Textile Crafts of Bangladesh

3.9.1 Geography and Location of Clusters

Production areas are located mostly the rural areas all over the country, in developing economies, there is usually little or inefficient infrastructure (Zhang et al, 2011), unstable political conditions, general strikes and flood are major barriers to export a consignment successfully on time (Batchelor & Webb, 2002).

3.9.2 Market Knowledge

Firstly, to create an effective marketing plan, it is necessary to obtain market knowledge and know the requirement of quality, quantity, price, lead time and design desired by the target international

buyers. There is a shortage of surveys both in enterprise and national level that identify the type and volume of textile craft products which has prospect in international market. Moreover, document containing basic economic and commercial statistics, major handicraft production centres and their capacity by each product group, numbers of these production centres, number of skilled producers by locality are important to facilitate the buyer business forecasting and source planning. Market intelligence services can continuously input the sector with current market information and demand to facilitate the growth of the industry. A vital issue for successful craft product marketing is proper positioning of the product in the marketplace. The target to reach upper end of the market had seen to be beneficial for the industries like craft sector. In addition, it is hard for particularly small enterprises to match with the requirements of the buyers (Benjamin & Malcolm, 1994).

3.9.3 Integrated Export Development Plan

In developing countries, though it is common that several projects run by the government or agencies work to ensure social, educational and vocational needs for the development of craft sector and its export market; there is a scarcity of an integrated export development plan, a well-designed export marketing strategy and effective campaign. Successful campaign can be arranged to reach to the international importers, merchandising and buying teams, well known international fashion designers. Arrangement for textile craft based trade fair, buyer-seller meetings and visit to the manufacturing site can be very effective in this regard. In addition, ministry of tourism, local tour operators, national airlines, and hotels, banking institution and shipping agencies also can play an important role for effective campaign.

3.9.4 Access to Finance

To reach export market and large scale-expansion of textile craft industry, it is vital to ensure adequate supply of raw materials. However, a little concentration in national level and establishment of policies and regulations were observed to maintain continuous availability of local origin materials. Craft workers are deprived of access to finance, which is one of the major constraints for textile craft export. Insufficient knowledge about loans and other finance facilities offered for the small entrepreneurs and exporters is a barrier for the craftsmen to arrange business running capital. In addition, they often face net loss in business operation due to lack of costing, pricing, management and other business skills. Surveys, researches, identification of requirements and objectives are required for the establishment of craft development strategy, which will allow identification of priority line and help in setting of targets and programs for this sector.

3.9.5 Loss of Skills and Quality of Production

The concept of quality needs to be applied throughout every stage of a supply chain. Establishment and application of quality standard along with the introduction of social and environmental standards like fair-trade and eco-labelling may be seriously considered for the success of this industry (McDowell et al, 2012). Scrase (2003) describes a paradox of craft production: the very popularity of the craft product leading to a partial demise of the craft itself as the product becomes increasingly commoditised, production becomes routine and monotonous, pay is often low and making (usually done by women at home) has to fit around the care of children and the elderly and household chores.

3.9.6 Human Resource Development and Managing Craft Production

Establishment of formal and informal training institutes and design institution can contribute to the development of artisan skill, management and entrepreneurship knowledge as well as culture the traditional and innovation part of craft designing. Bank's examination of the role and status of craft labour in the creative industries of UK noted that for craft networks that were managed the following issues were becoming increasingly significant: "commitment to quality being diminished by necessity for speed and instability" (Banks, 2010, p. 316) and technical base was becoming increasingly fragmented and competitive for work leading to fewer opportunities for the type of learning that is possible within a guild type of network (Banks, 2010).

3.10 Conclusion

This chapter has outlined the textiles supply chain, sourcing issues and its implications for the textiles crafts industry. Routes to market were outlined for some craft products and issues raised by craft production systems and their inclusion into a global value chain were also examined. Questions raised in this literature review were how the Bangladeshi textile craft workers gain access to global supply chain – how do they make contact with prospective buyers, what quality and timing issues do they have to work with, what knowledge do they have of product development? These questions are the basis for developing the interview schedule formulated for the research, which will be explained in chapter four.

CHAPTER 4 - METHODOLOGY

4.1 Introduction

To conduct this study, this chapter reconsiders certain research approaches, their phenomenon and advantages of different research methodologies. Therefore, a study of the available research methodologies will help to identify the suitable method for collecting and analysing the data and to consider the main issues such as the type of data, investments of participants' time, investment of researcher's time, cost, disruption of natural activities, accuracy, built-in design possibility, utility of additional method, cultural bias of data collection method (Stawarski, Cathy, Phillips, & Pulliam, 2008).

4.2 Primary, Secondary and Tertiary Data

A vital issue in a social research is the extent to which a researcher is detached from the phenomenon under study. By definition, any observer is already one step detached from any social phenomenon as he is observing it from outside. Therefore, the processes of observation require a degree of interpretation and manipulation. Considering this phenomenon, the data can be categorised into three; primary, secondary and tertiary data (Blaikie, 2003).

4.2.1 Primary Data

Primary data collection method refers to the process where the data are collected and analysed by the same researcher (Gregory, 2009). This method is essential when a researcher cannot find the data needed in secondary sources (Duval, 2005). The major advantage of this method is that a high coherence between theoretical and operational concepts can be maintained as the researcher can control what is collected and how is collected (Gregory, 2009). However, this method can be costly regarding the time and resources in compare to the secondary data collection process. Primary data collection is useful in the area of trade research, especially when looking at the needs of specific groups or institutions or sub sectors, effects of trade regulations, procedures, and other non-tariff barriers, linkages between trade and other issues (Duval, 2005).

4.2.2 Secondary Data

Secondary data analysis is analytical work conducted on data that has been collected for someone else's research. The analysis may involve using the original or novel research questions, theoretical framework and statistical methodologies. This type may have been collected from various large scale surveys which could be numeric or non-numeric (Smith, 2011).

4.2.3 Tertiary Data

Tertiary data is the one that have been analysed either by the researcher who collected the raw data or an analyst of secondary data. In this case, only the results of the analysis could be available not the original raw data. Therefore, a researcher analysing a tertiary data is further detached from the original primary data source. The published research reports or formally collected 'statistics' includes tables of data that have been categorised and summarised from the original raw data. For example, most government census reports data are this type of data. Therefore, when an analysis is done based on the census data, it produces a genuine tertiary data. As the researcher have no control over the steps involved in moving from the raw primary data to tertiary data, such data therefore requires more attention (Blaikie, 2003).

4.3 Research Approaches

4.3.1 Qualitative and Quantitative Method

Qualitative Method

Qualitative data provides well-grounded and rich descriptions that explain the processes in identifiable local contexts. Qualitative research is a field of inquiry that is performed through an intense and/or prolonged interaction with the "field" or life situation where the researcher's role is to acquire a "holistic" (systemic, integrated and encompassing) overview of the context under study about its arrangements, logic, and its explicit and implicit rules (Miles & Huberman, 1994). Such data cannot readily be converted into numerical value but can be represented by categorical data, by perpetual and attitudinal dimensions. One of the most popular techniques of representing qualitative data involves "word tables", in which the empirical evidences are systematically organized but the cells are filled with words rather than numbers (Yin, 1993). This type of research method is widely used in the fields of education studies, management studies, social work studies, information studies, psychology, communication studies, nursing service studies, human service studies and other (Glenn, 2010).

Quantitative Method

Quantitative research method are characterised by the assumption that human behaviour can be explained by the social facts which can be investigated by the methodologies that utilise the logic of social sciences (Amaratunga, Baldry, Sarshar, & Newton, 2002) The quantitative data ranges from simple counts such as the frequency of occurrences to more complex data such as prices or test scores. Moreover, quantitative analysis techniques range from tables or diagrams showing frequencies of occurrences, establishing statistical relationship between variables or complex

statistical modelling (Saunders, Lewis, & Thornhill, 1997). In this method, data are collected and subsequently coded at different levels of numerical measurement (Kervin, 1992).

4.3.2 Comparison between Qualitative and Quantitative Data

One major phenomenon of the qualitative research is that it focuses on naturally occurring ordinary events, therefore it helps to identify the scenario of 'real life'. It is rich with the local 'groundedness' as the data are collected in close proximity to a specific situation. Qualitative data focuses on a specific case, as well as the influences of local context are taken into account. Another significant characteristic of qualitative data is their richness and holism. They offer a 'thick descriptions' of a real context that are intense, and present the accurate fact that makes a strong impact on the reader. Moreover, these data can be powerful information to study a process (including history), as these are typically collected over a sustained period. Every stage of a certain process and the reason behind can be studied and identified through these data, rather than just measuring in numbers. Furthermore, qualitative data with their emphasis on people's 'lived experience' are well suited for locating the 'meanings' people place on the events, structure and process of their lives. Their assumption, prejudgement, perception and presuppositions come out in a qualitative data (Miles & Huberman, 1994).

4.4 Data Collection Techniques

For the research purposes, data can be collected through any of the methods like personal interview (one-to-one), focus group, observation, self-administrated (mail or internet) surveys, telephone interviews/surveys (Duval, 2005). Therefore, researchers generally rely on four methods for collecting information for qualitative data, such as observing directly, participating in the setting, analysing documents and material culture, and interviewing in depth (Glenn, 2010). Miles and Huberman (Miles & Huberman, 1994) mentioned observation, interview and experimentation as useful data collection technique.

4.4.1 Interview

Interviewing is a popular data collection method for qualitative research in the field of social science as it is flexible, intelligible, accessible, and able to bring out the important and often hidden aspects of human behaviour and belief (Hannabuss, 1996). Nowadays both qualitative and quantitative research tend to depend on the interviews as the major research method for collecting data, whether the aim is to gather a rich in depth information or a tiny point of a whole event (Atkinson & Silverman, 1997). The possible reason of depending on this method is that it might be an appropriate way of collecting information and opinions of people in an organization or customers or users (Hannabuss, 1996). In addition, it has the benefits of providing responses in the of the way the

interviewee thinks, and uses language that can be important if the researcher is looking for the way how respondents look at a certain event. Basically, research interviews are of two main categories: structured and unstructured (Stawarski, et al., 2008).

Structured Interview

Structured interviewing involves asking all respondents the same series of pre-established questions with a limited set of response categories (Fontana, Prokos, & H, 2007), where generally the findings are organised and quantified directly (Hannabuss, 1996). There is very little flexibility of the way the questions are asked that leaves a tiny scope for variation in the responses except open-ended questions, which are infrequent, may be used (Fontana, et al., 2007). The highly-structured approach may be good for gathering data about large population using a reference library or for finding out the customers' choice of consumer goods (Hannabuss, 1996).

Unstructured Interview

Unstructured interviewing can offer better coverage than other types of qualitative research methods (Fontana, et al., 2007), since it allows the interviewer to probe for supplementary information. Basically, this type of research interview questionnaire contains few general questions that can lead to more elaborate information as important data are disclosed. It requires a good interviewing skills in asking follow-up questions (Stawarski, et al., 2008).

4.4.2 Fieldwork and Observation

Participants' observation is the traditional research methodology employed in fieldwork; although the term 'fieldwork' refers to some other forms of case studies and co-participative inquires like oral histories, life-histories, action research, also entails aspects of fieldwork as well. Fieldwork refers to a form of inquiry in which one involves oneself personally in the on-going activities of a group or an individual for collecting the data for a research. The term 'fieldwork' includes all the activities that one does when at the physical site of a cultural group, such as observing, recording, listening, conversing, interpreting, and dealing with logistical, ethical, and political issues (Wolcott, 2005).

4.4.3 Experimentation

The basic principles of experimenting is in fact playing around with the variable (the one that the researcher suspect to be the causal variable), and observe what changes does it make in another variable (the effective variable). In simple words, the experimenter deliberately alters the values and levels of the casual variable, and notes if it creates any effect on corresponding changes in the other variable. If it does and the experimenter can confirm that there is no other variable in the situation

that may have produced the effect, then it can be assumed that the variable which has been manipulated has indeed produced that certain change. Therefore, the experimenter establishes a cause-effect relationship between the two variables. This is the logic of experimental design (Harris, 2008)

4.5 Research Aims and Objectives

The primary aim of the research is:

- To investigate the potential to incorporate Bangladeshi textile craft into a global fashion supply chain.

Research objectives are to:

- Conduct a literature review to understand the Bangladeshi textile craft industry and the global supply chain.
- Conduct in-depth interviews with the people in the supply chain from craft producer to retailer to:
 - a) Outline and understand the mechanism of a global apparel textile supply chain and
 - b) Identify the constraints regarding incorporating the Bangladeshi textile craft industry into the existing global supply chain.
- Compare and contrast the literature review with research findings to make recommendations for a supply chain incorporating the textile craft producer.

4.6 Proposed Research Method

As this study aimed to find suitable ways of establishing a link between the local textile crafts of Bangladesh with a global supply chain, qualitative research method was employed, and data were collected by the interviews. The qualitative data collected by the interviews will identify the potentiality and limitations in establishing this link as well as a solution to cover the possible constraints.

4.6.1 Qualitative Interviews

Five sets of questionnaire were prepared, from textile craft manufacturer through to distributor of Bangladesh, who are present in both local and export market. The interview questions are located in appendices 1-5. Figure 4.1 illustrates the global supply chain for fashion and textiles. The proposed linker- sourcing offices of international retailers at Bangladesh and the buyers in

international market were also interviewed to get detailed understanding of global supply chain and the potential for creating links. Moreover, an international retailer of such products was interviewed to get knowledge about actual customers' desire and expectation. Finally, an interview with a researcher and expert of Bangladeshi textiles was conducted to identify the beneficial strategy for Bangladeshi textile crafts to enter into global market through an integrated supply chain.



Figure 4.1 Selection of Interviewees throughout the Supply Chain

4.6.2 Instruments Used

Three of the interviews were conducted over skype which were recorded with PrettyMay software; two were telephone interviews as the interviewees did not have access to skype. The sixth interview was a face to face interview. The recorded versions of all these interviews were kept for further reference. Moreover, Bangladeshi online newspapers written in Bengali were taken as reference to review the literatures on current contexts of Bangladeshi textile crafts. In that case, writing in Bengali font helped to search relevant contents. The interview transcripts may be found in appendices 6-11.

4.7 Conclusion

This chapter has outlined the research methods considered and the reasons for the choice of qualitative in-depth interviews as the appropriate research method for this research. From the literature reviewed, it seemed appropriate to interview a variety of members of the textile crafts chain – from the craft producer to buyers and retailers as well as educationalists – to develop as holistic a picture of the potential to develop Bangladeshi textile craft for the global value chain and its potential implications.

CHAPTER 5 - RESULTS

5.1 Introduction

This chapter presents the results from the interviews. The chapter is structured in the following way:

5.2 data gathering: a short description of how the data was collected. The interview questions are in appendixes 1-5.

5.3 outlines of the results of the interviews conducted with summaries of the transcripts organised into themes to enable comparison of the transcripts. The transcripts are in appendixes 6-11.

5.2 Data Gathering

5.2.1 Time and Place

After a precise selection of the interviewees, a standard mail (please see appendix 14) was sent to them describing the aims of the research, the way how it will benefit the industry, confirming that the organisations confidentiality will be maintained, and provided the questionnaires attached with the mail. The responses were obtained and the interviews were conducted with the following employees of different organisations:

- Nurzahan, textile craft manufacturer in Bangladesh.
- Ferdous Chowdhury, senior officer in the export department of textile craft manufacturer and retailer in Bangladesh.
- Faridur Reza Sagar, merchandising manager in a textile sourcing house in Bangladesh.
- Nasrullah Khaled Pablo, employee of a mainstream apparel buyer in UK.
- Marek Derych, employee of a craft retailer in UK.
- Mahmudul Akonda, researcher, expert and teacher of textiles of Bangladesh

The data collection process through interviewing was done mainly in January and February 2012. As described in Chapter 4.6.2, three of the interviews were carried out over Skype, one was face to face interview and two were telephone interviews. For interviewing people in Bangladesh, morning time was selected as calls were made from UK, and it has six hours' time difference with Bangladesh and the busy time in the work place at the end of the day had to be avoided. On the other hand, the

interviews with the interviewee living in UK were done in preferable time as scheduled beforehand, which was mostly in the afternoon.

5.2.2 Interviewing Procedure

Since the responsibilities were different for each organisation, six different sets of questionnaire were prepared that asks about the same issue from different organisation's or profession's perspective. Five set of semi structured questionnaires are attached in the appendix 1-5. Conversations were recorded to ensure that the researcher did not miss any important information. There were no major problems encountered, except the interview with Ferdous Chowdhury was not recorded for less than one minute at the beginning. However, a note was being taken at that time and the interviewee was requested to repeat that part at the end of the interview session to record.

5.2.3 Interview Transcripts

After each interview, the audio was listened to a few times and transcribed (See Appendix 6-11) after translating from Bengali to English (four out of six interviews were conducted in Bengali). In addition, to have proper evidence all the interviews were stored in computer. Moreover, those have been written down on notebook in the same language as the interview was undertaken, to keep a clear record that helped the researcher during analysing the data (please see appendix 12).

5.2.4 Interviewee 1 – Nurzahan

Type of the Company:	Small Entrepreneur
Number of Years in the business:	Approximately 20 years
Address of the Business:	House No-5/5, Road No 4, Section 12B, Dhaka, Bangladesh.
Telephone:	+88028032196 (on request)

5.2.4.1 Overview

The telephone interview was conducted on February 6, 2010 at around 1pm to 2pm (UK time). She is currently working for the local distributors of textile crafts at Islampur and Nowabpur at Dhaka in Bangladesh. The main objective of the interview was to understand the barriers to export the textile craft products from Bangladesh, and to understand the mechanism of their existing local supply chain. It was difficult to conduct the interview with an actual craftsman as very few of them uses phone; moreover, getting the contact details was not simple as well, as their details are not listed on any directory. Nurzahan's neighbour's phone was used on request to interview her.

5.2.4.2 Interviewee's Background

Nurzahan has experience as a craftswoman for approximately 20 years. She makes textile crafts on part-time basis. She did not receive any academic training on craft work. She has been working individually, and not involved with any co-operative society. Nurzahan learnt craft work mainly from her neighbours who introduced her with a person called 'mahazon' who brings work order. She is mainly expert on hand embroidery, and attaching studs, sequence, beads by hand stitches. Nurzahan used to work for Aarong, the biggest local craft product retailer in Bangladesh, and now work for some textile craft distributors at Islampur and Nawabpur of Dhaka.

5.2.4.3 Design Idea

Type of Craft Work

The interviewee, Nurzahan is an artisan who mainly does the hand embroideries on 'Saree' and 'Kameez' (Tops for girls and young ladies in Bangladesh). Generally, she does 'Kacchipur Embroidary' on 'Saree' and 'Kacchi Embroidary' on 'Kameez' with coloured embroidery threads, which are local names of different types of hand embroideries. However, she mentioned that embroidery on Saree is mainly on trend now, therefore she mostly works on Saree. Apart from these, she adds sequences, beads, diamantes as per the requirement, which are usually bought in 'tola' or 'rotti' , or sometimes in 'poa' (terms usually used for measuring weight of gold or silver in Bangladesh; Tola= Bhori=4 rotti=11.668 gram, (<http://www.definition-of.net>, 2011)).

Idea and Inspiration for New Design

As Nurzahan stated, she gets the designs mostly to do the embroidery, as people from factory print the design on the fabrics before embroidery. However, sometimes she makes her own designs, as she said it is around 5 percent of her total work. Mostly, she learns the techniques from other artisans while they do their work, and she takes the ideas from them and sometimes copies them or creates something similar with her own creativity. Apart from this, sometimes she gets ideas from the sketches or photographs.

5.2.4.4 Communication and Organisation

First Introduction with Local Wholesalers

According to Nurzahan, her elder daughter worked in a factory used to bring her works at home and Nurzahan learned the work from her. Moreover, one of her neighbour used to get orders from Aarong and give other artisan to complete the works. She provided orders to Nurzahan to complete and gradually, she got introduced with Aarong and other wholesalers who are locally called

‘Mahazon’. These ‘Mahazon’s bring orders from wholesale traders and factories of Islampur and Nawabpur and give it to them to complete. As she mentioned these ‘mahazon’s get introduced with artisans through personal connections.

Communication with Local Wholesalers and Their Organisation

According to Nurzahan, ‘Mahazon’s bring orders in hundreds or thousands from factories at Nawabpur or Islampur. These ‘mahazon’s are mainly female, and Nurzahan takes order of 4 to 10 pieces from each lot. She completes those by herself and distributes others as well to do the embroidery work. These artisans work individually and not involved with any co-operative society.

5.2.4.5 Issues Associated with Craft Work

Payment

Nurzahan, an artisan of hand embroidery of Dhaka gets her payment on per piece of work. Generally, she gets paid around tk. 800 or tk. 900 (1 GBP=Tk. 128.10, 1 EUR=Tk. 106.00 on 13/03/2012, (sonali-bank, 2012)) for embroidery on each piece of Saree. Payment for Saree with two or three types of hand embroidery work may rise up to tk. 1200 or 1500 depending on the type of embroidery. When Nurzahan was asked about the factors on which the price depends and negotiating factors, she mentioned that she does not know what price ‘mahazon’s get for embroidery work on each piece of Saree. When they negotiate, they usually consider the type of embroidery stitch and its density. In general, for ‘kacchipur Embroidery’, she is paid tk. 500 and for ‘Kacchi Embroidery’, that is around tk. 300 or tk. 400, and the price will increase with the density of stitches.

The Time Issue

According to Nurzahan, she is not usually asked to finish her work within a time frame; whenever she can complete her works, she goes to ‘mahazon’ to return the product. She is only requested to finish the work as soon as possible. However, she usually gets the orders to complete within approximately a month. Therefore, when she needs to work faster, she involves more artisans on it. In general, when two or one person works it may take ten to fifteen days or even sometimes twenty days to complete a piece of work; whereas with four or five artisan involved, she can finish the work quickly like within a week. Since four of her family members work together, they can work faster and can complete a piece within a week. However, when she was asked about the machine or facilities that might help her to increase efficiency, she mentioned about uninterrupted electricity supply till

late night which might help them to work long hours as electricity is unavailable at most of the time at night during summer in Bangladesh.

Quality of Work

During embroidery, Nurzahan follows the print on the fabric which is done by the people from whom she gets order. As she stated, attention to detail and deep concentration are required to maintain the quality of work. Therefore, if she spends enough time on her work, she can make a quality product. So, dedicating enough time is crucial for maintaining the quality of the product.

5.2.5 Interviewee 2 – Ferdous Chowdhury

5.2.5.1 Overview

Telephone Interview with Ferdous Chowdhury was conducted on January 18, 2012 at around 8am (UK time). He works as a senior officer of the export department at Aarong, which is the largest local craft manufacturer and retailer in Bangladesh with long time experience in export market. One of the objectives of this interview was to understand the current global supply chain of Bangladeshi craft products, and constraints on exporting textile crafts from Bangladesh to global market.

5.2.5.2 Company Details

Name of the Company: Aarong (Established in 1978)

Size of the Company: Represents 65,000 artisans all over Bangladesh

Address: Aarong Corporate Office, 346, Tejgaon Industrial Area, Dhaka, Bangladesh.

Email: export.aarong@brac.com

Phone: +88 02 8891418

BRAC, which was founded in 1972 to assist refugees after the Bangladesh-Pakistan war in 1971, is the world's largest non-governmental organisation. The major operations of BRAC are microcredit financing and poverty alleviation. With manpower of 110,000 and microloans for the rural people worth \$4.6 billion, BRAC actively works in healthcare, education and poverty (foreignpolicy, 2008). As a part of this, in 1976, BRAC started working on identifying and experimenting with various crafts that women could produce at home, and began providing them the training. Consequently, their first outlet was opened in 1978 with 'Jamdani', 'Nakshi Kantha', block printed 'saree', handmade jute products, leather goods, silver jewellery and many other traditional handmade products (Promotional Literature of Aarong, please see appendix 13).

Therefore, (promotional literature of Aarong) the Ayesha Abed Foundation (AAF) was established in 1982 to ensure the financial and technical assistance and training to the rural women on various craft skills, and to offer the proper working environment for them. Aarong buy all the products made by the artisans under AAF.

By 1990s, Aarong had become one of Bangladesh's biggest retail chain and the leading fashion house which has now nine stores spread across the major cities of the country; one franchise in London, UK. Aarong is currently exporting their craft products to Italy, Netherland, Spain, France, Canada, North Korea, Japan and Australia. All the production workers of AAF are the member of BRAC's village organisation; thus AAF is ensuring the livelihood of over 65,000 artisans through 13 AAF centres and nearly 647 sub-centres.

5.2.5.3 Interviewee's Background

Ferdous Chowdhury is the senior officer in the export department of Aarong and working in this position for 1 year and 6 months. He did three months internship in Aarong before start working in that position. He achieved his bachelor degree in Business Administration from BRAC University.

5.2.5.4 Current Position, Interest and Limitation for an Integrated Supply Chain

Current Situation and Limitation in Exporting Bangladeshi Textile Crafts

As Ferdous stated, Aarong is completely ready to export as they have been exporting for quite a long time, and they have all the preparation and logistics to support for that. In addition, the small boutiques or NGOs can take the support from Aarong to ship their goods in international market. According to him, it is very important for all craft manufacturing organisations and NGOs in Bangladesh to work together, and support each other to compete in the world market. Therefore, they are united and can create forums like Bangla Craft to arrange exhibitions.

Lengthy manual process of craft production, such as hand embroidery or tie-die printing is a barrier for mass production of Bangladeshi textile crafts. To run the business smoothly, the buyers of these products need a good understanding and knowledge of the total production process. However, whoever is involved in this business, the buyers of craft product are already aware of that fact.

Interest of Local Textile Craft Industry to Have An Integrated Supply Chain for International Market

According to Ferdous, the producers of textile craft products have an association in Bangladesh called 'Bangla Craft' and most of the boutique houses of Bangladesh is member of that association. They are involved with promotional activities and arranging fairs through this association for

marketing their products. In addition, they have been creating opportunities for international buyer to visit through agencies or NGOs. Therefore, it is evident that the textile craft industry of Bangladesh is interested and trying to develop a market demand for their products globally.

Communication with International Buyers and Limitations of Current Supply Chain

As Ferdous described, it was long ago before he joined this company, Aarong has started exporting their craft products in 1986. UK based company called 'Trade Craft' was their first international customer. Then they expanded their business gradually, and currently have business with many big international companies. Like other craft product supplier, Aarong's customers are mainly various national NGOs. These NGOs source small quantity of products like tapestry, wall-piece or leather products for their different programs. For Aarong, they could take the opportunity of the international reputation of BRAC and good business relation with other NGOs who source craft products from Aarong. In addition, there are some commercial buyers as well who source from Aarong.

During describing the first communication with international buyer, Ferdous first mentioned the beginning of this social enterprise. Aarong, being part of BRAC, is the largest NGO in Bangladesh around 65,000 people in Bangladesh. Basically, BRAC has a foundation called 'Ayesha Abed Foundation' who manufactures the craft products. Then these products are exported through Aarong. Regarding supply chain, regular communication and co-ordination with the actual producer and buyer, Ferdous stated that there are four sections in export department of Aarong: export communication, export production, export commercial and export packaging. The export communication department communicate with buyers, give feedback, send electronic catalogues etc. Buyers choose the product and meanwhile they negotiate the price, terms and conditions or other points.

While discussing about the constraints for exporting Bangladeshi textile crafts, Ferdous mentioned that there is no limitation for Aarong in exporting the crafts as it has well-equipped suppliers with quality service. They have been exporting smoothly for last 25 or 26 years. However, he mentioned that the buyer needs to understand that the process is manual; therefore the products cannot be produced very fast. In addition, they do not supply from the products which is in the production process currently, rather they start production process after getting the orders from buyers. Moreover, natural disaster like flood often interrupts the productions as the artisans live in the remote villages where they often suffered from flood.

Quality of Bangladeshi Textile Crafts

According to Ferdous, they have to compete with other strong competitors of this market like India, Vietnam, China and some other third world countries. Therefore, they are maintaining a good quality that enabled them to survive in this competition. In addition, Aarong is a member of Fair Trade, for which they have to maintain 10 points quality standard regarding environment of the production area, child labour etc. They always maintain some basic points of quality standard such as Azo-free dyes, colour fastness, dye that does not create irritation on skin. They maintain colour fastness even for the paper products. There is a very big list of quality standards which varies according to different buyer, different country and even associations requirement. For an example, to export a wall frame made of bamboo to UK, they have to treat the bamboo to protect it from fungus at UK temperature. Therefore, there are a set of strict standards for each product as like machine made products that the suppliers required to maintain.

About the scope of improvement, Ferdous stated that the handmade products are not uniform, a flower motif can be a bit bigger or smaller; therefore, there is no limit for improvement. However, working with extremely underprivileged artisans of a third world country will always leave some drawbacks. As an example he mentioned, the product details such as pantone number of a certain colour are sent from Dhaka, and they need to be aware of those and need proper education to understand those information. Therefore, Aarong is working on that and running training and educational programs for them.

Lead Time

Generally, Aarong delivers consignment within three months or sometimes before that. If they get an order of a larger quantity they estimate the current capacity but usually it does not exceed three months. If they can make it before deadline they ship the product as soon as possible, as inventory in warehouse will add extra cost. According to Ferdous, they met the deadlines for 95% of their orders till now; although for a craft product, it is very difficult to measure the production time specifically.

Similarly, Ferdous thinks that the other small boutiques also meet the deadlines as international buyers do not allow a longer lead time. Although NGOs and small or medium sized boutiques have some limitations, but they try to maintain the lead time.

Price Issue

According to Ferdous, depending on the type and density of crafts, a basic men's top would be approximately five to seven dollar. Moreover, he pointed out that it is very difficult to reduce this price. Because, the minimum fabric cost that required for this top's would cost approximately 2 dollar; then the wage for the artisan, cost for overhead, textile team, fashion designers are also added.

But for the speciality of the traditional design, they do not demand any additional cost as they currently want to promote their products. Basically, the price is determined by the artisans. Then, they add their mark-up, duty expense and other further associated cost. However, the products are relatively expensive in their overseas store because of higher costs associated with outlet rents, employee's salary, maintenance cost, shipping charge etc.

5.2.6 Interviewee 3 – Faridur Reza Sagar

5.2.6.1 Overview

This interview took place on the 9th January 2012 with Faridur Reza Sagar, the Merchandising Manager of Mondial Orient Ltd, a sourcing office of C&A apparel fashion retailer in Bangladesh. The interview was conducted to understand the international buyers' interest in exporting Bangladeshi textile crafts in mass volume and constraints in developing a global textile supply chain for this industry and its extent.

5.2.6.2 Company Details

Name of the Company: Mondial Orient Limited (C&A established in 1911)

Size of the Company: 36,000 employees of C&A in all over Europe & Approximately 200 employees in Bangladesh Sourcing office of Mondial Orient Limited

Address: AJ Heights, Cha-72/1/D, Progoti Shoroni, Uttar Badda, Dhaka, Bangladesh.

C&A, named after the founders initials- Clemens and August Brenninkmeijer, opened their first store in Germany in 1911. During Second World War they expanded their business and at the beginning of 1960s, they opened stores in Belgium, France and Switzerland. At present C&A is still managed as a family company and expanded their business to China, Brazil and Mexico.

What started as a two-man operation now has a manpower as large as 36,000 in Europe working at more than 1,400 branches. With more than 450 stores, Germany represents the biggest market; and

Netherlands, Austria, Belgium, Spain and France are in the second, third, fourth, fifth and sixth position respectively. Recently, C&A has opened its stores in Italy, Romania and Croatia as well.

C&A has a collection of fashion for the whole family. The twelve sub-brands ensures the collection to serve the customers of a wide range; hip and trendy or classic and elegant. C&A is equally successful in in-store XL shops where they have products of larger sizes. (<http://www.c-and-a.com/uk/en/corporate/company/about-us/history/>).

5.2.6.3 Interviewee's Background

Interviewee Faridur Reza Sagar is a specialist in sourcing denim and non-denim product, who has been working at Mondial Orient Limited for three years and six months since August 2008 as a Merchandising Manager. Before joining C&A, he worked as a Senior Merchandiser at Li & Fung Trading Ltd for 8 years and six months (from January 2000 to June 2008), where he used to manage mainly the retail business with North America, Canada & Australia.

5.2.6.4 Prospects for Bangladeshi Textile Crafts in International market

Limitations in Exporting Textile Crafts from Bangladesh

Bangladesh is currently exporting its textile craft products but not in a large volume. Since there is limitation of information and knowledge within this industry, the market has not been developed. As Faridusr Reza Sagar mentioned "... we don't know about the market properly like...which market...where is the export market, what are the requirements, what is the market standard...only one or two companies who know about it are doing business and they don't share with others." Moreover, since the products has not been promoted and advertised in international market properly, global buyers do not have a clear knowledge on Bangladeshi textile craft products. In addition, limited research has been done on identifying the potential Bangladeshi textile crafts that can be popular in international market, and then on recognising an appropriate market for those products. Achieving a good international market for few products may help in gradually promoting and presenting more products.

Buyers' Interest in Sourcing Textile Crafts of Bangladesh

According to Sagar, it looks like there is a big international market for textile crafts but the customers prefer the suppliers who can give competitive price in an economy product range. Though Bangladesh can offer low cost product, but this industry is still weak in Bangladesh considering the product development capacity. In that case, buyers prefer sourcing from China or India as they have already developed their craft industry to serve their internal demand.

There are only few buyers who have a section for crafted products and interested in sourcing these types of products. In that case, large boutique shops in Bangladesh like Aarong is supplying them; whereas the small boutiques established on private investment seems absent in the export market. They need to develop their R&D as well as support needs from the government through national policies.

Current Position of Bangladeshi Textile Crafts in Global Market

As Faridur Reza Sagar experienced, some of the large retailers source handmade products from Bangladesh. Those particular buyers were attracted to hand-made bed sheets for its uncommon look, hand-feel and most importantly its environment-friendly characteristics. As a part of the campaign for green products, that buyer had a particular section for eco-friendly products, what they were continuously sourcing from Bangladesh. However, Sagar has highlighted that, even if the buyer require a big volume of that kind of product, a very few supplier available who can supply that large volume.

5.2.6.5 Problems Associated with Exporting Bangladeshi Textile Crafts, Its Extent and Possible Remedies

Introduction of the Craft Manufacturer with the International Buyers

Bangladesh is currently exporting textile crafts but not in a large volume. Since there is limitation of information and knowledge within this industry, the market has not been developed. As Faridur Reza Sagar mentioned “... we don’t know about the market properly like...which market...where is the export market, what are the requirements, what is the market standard...only one or two companies who know about it are doing business and they don’t share with others.” Moreover, since the products has not been promoted and advertised in international market properly, global buyers do not have a clear knowledge of Bangladeshi textile crafts. In addition, limited research has been done on identifying the potential Bangladeshi textile crafts that can be popular in international market and then on recognising an appropriate marketing strategy for those products. Establishment of good international market for few products may help promoting and presenting more products gradually.

From practical working experience of Sagar in the local sourcing houses, he said that the apparel manufacturers usually get introduced with the international buyers by the people who are involved in apparel business or through the information available in the print and electronic media or by attending international exhibitions and trade fairs. He suggested the textile craft suppliers who want to do business in international market should attend the international trade fairs and exhibitions.

Moreover, he suggested inviting the buyers to visit the factories, to get introduced with the products. In addition, he mentioned about giving sales presentations to buyers or the people of international buying houses in Bangladesh and displays of available products to them.

Quality Level of Textile Crafts

From Sagar's point of view, there is no scope of ignoring international quality standards, and quality of local textile crafts requires improvement to meet international standard. However, there is a tolerance in quality standard for all products, whether it is a machine made or manmade.

He stated that the physical appearance would be the main concern for textile crafts. Before testing other standards with the equipment, buyers will judge if it is visually acceptable, sellable and usable or not. However, he pointed out that this visual measurement can vary man to man.

Lead Time for Textile Crafts

Lead time for a certain order depends on order quantity. For an example, an order of minimum 2,000/3,000 pieces of industrial apparel needs approximately 4months but for a smaller quantity it is less than that. Moreover, the product type, size and its complexity also determine the total production time. However, according to the interviewee Sagar, this lead time can be extended for craft products considering the manual process of production. As he mentioned "If we get rigid... we will be rigid but it should be justified.... It will not work if we get rigid to a level which is not justified".

Competitive Price

According to Sagar, the price of a product depends on various factors such as type of materials used, type of product produced, production rate, and number of people required for the production. Therefore, when a buyer buys a product from any supplier, they calculate the price based on all these facts and find out the reasonable price that can be offered. The price of textile crafts may vary up to 20% from industrially mass produced apparel. However, Sagar strongly emphasised on the point that it is merely an idea; the price may vary on numerous facts. As he stated "It is hard to say in this way as it is completely product based, if I can see the product then I can tell. But without having a look at the product I can't assume a price". Moreover, he mentioned an example of an order of 10,000 pieces of basic men's top, if the buyer pay \$5 per machine made garment, they might agree to pay \$6 per garment if it is textile craft .

5.2.7 Interviewee 4- Nasrullah Khaled Pablo

5.2.7.1 Overview

A Skype interview was conducted with Nasrullah Khaled Pablo who works in a buying house in UK. The interview was conducted to understand international buyers' interest in importing Bangladeshi textile crafts in mass volume and constraints in developing a global textile supply chain for this industry and its extent.

5.2.7.2 Company Details

Name of the Company: Response Clothing Limited (sourcing and manufacturing unit, which is now closed)/ Breeze International Limited (Sales Unit)

Size of the Company: 150 employees approximately (Established in 1994)

Address: Unit 7, 31 Bay Street, Blackburn, B1 5NJ, UK

Breeze International Limited is a family owned apparel buying house that was established in 1994. In 2011 yearly turnover of this company was around 6 million pound with their only office in Blackburn. This company usually places orders of 6,000-7,000 pieces of garments per order, which cover both men's and ladies tops and bottoms. It used to have a sourcing and manufacturing unit under the name of 'Response Clothing Limited' which has been closed recently and currently continuing with the sales unit only. This company's target customers are mainly middle aged women of UK, and many of its products are sourced from Bangladesh.

5.2.7.3 Interviewee's Background

Nasrullah Khaled Pablo works at Breeze International Limited, an apparel buying house as a Production Manager. He has completed his Masters in Polymer Chemistry at University of Bolton. In addition, he has gained experience of working in the denim fabric manufacturing unit of Beximco Group in Bangladesh.

5.2.7.4 International Buyer's Interest to Source Bangladeshi Textile Crafts and the Possible Ways to Get Introduced with Them

As Pablo experienced, international buyers are interested to source textile crafts from Bangladesh. These products, even small quantities can be sold through the online shopping websites like Amazon or eBay. However, Breeze International Limited has not imported any textile craft materials from Bangladesh. While asked for the reason, Pablo replied that their target customer is a specific group of people and they are not interested to such products. If the craft based product designs, motifs and patterns can be presented through renowned designer or in fashions catwalks, it would be able

to attract customers as some of the fabrics of Bangladesh are excellent in quality. In addition, Bangladesh mainly manufactures cotton based textile crafts, whereas manmade fibres are popular due to the cold weather of this region. However, he thinks that silk products of Bangladesh can have a good market in UK as it is comparatively cheap in Bangladesh.

To find a new supplier, generally international buyers use internet communication, so it is better if a manufacturer has their own company website. Otherwise, suppliers can look at export directory or potential buyer's website to know about their imported product categories, requirements, and the collect their email ID.

5.2.7.5 Issues Associated with Exporting Bangladeshi Textile Crafts

Quality Standard

The buyer that Pablo works for requires M&S and Arcadia quality standard. About the flexibility of quality standard for textile craft products, his opinion is that the European buyers are very strict on quality standard and its maintenance. They can allow around 3% deviation or often up to 5% depending on various quality parameters.

Lead Time

As per Pablo's professional experience, after placing an order, Breeze International Limited allows average 9 weeks for procurement of raw materials, production and shipment. As time is a key issue in fast moving fashion industry, it is hard to be flexible regarding this issue. Considering the lengthy manual process for textile craft production, a buyer can agree with maximum 1 week extra time, which is in total not more than 10 weeks.

Competitive Price

Generally, Breeze International Limited sets a product price based on 25-30% profit for the company. The practice is that they ask for the total costing to their regular suppliers, and evaluate if the company can profit at least 25-3% after selling the products to the end customer. In addition, cost for consignment shipment, tax and duty are also considered. The orders are placed based on suppliers' asking price, capacity, quality of the product sample and capacity to meet other requirements, and a successful trial in the target market. According to Pablo, if Breeze International Limited pays around USD 2.5 per garment, they would pay USD 3 to 4 for that of textile crafts.

5.2.8 Interviewee 5- Marek Derych

5.2.8.1 Overview

A face to face interview was conducted on February 7, 2012 from 3pm to 4pm. The interview was taken place in the office room of Oxfam Standard Shop at Chorlton, Manchester, UK. A video of the full interview was recorded. The main objective of this interview was to acquire a deep knowledge actual customer experience, impression, attitude and opinion about textiles crafts; moreover the experience of shop manager on those products.

5.2.8.2 Company Details

Name of the Company: Oxfam International (Established in 1995)

Size of the Company: 9,299 employees and 46,283 volunteers as of 31/03/2011 in 92 countries

Address: Oxfam Standard Shop, 494 Wilbraham Road, Manchester, M21 9AS.

Telephone: 0161 861 0108

Oxfam, an independent non-governmental organisation, is an international confederation of 15 organisations based in 92 countries. It was established in 1995 with an aim to find long lasting solutions to poverty and injustice. Their focuses are mainly on development, emergencies, campaigning, advocacy and policy research. This 15 member organisations are mainly based in Canada, France, UK, Mexico, Spain, United States, Australia, Germany, Belgium, Hong Kong, India, Ireland, New Zealand, The Netherlands and Quebec (<http://www.oxfam.org>).

5.2.8.3 Interviewee's Background

Marek Derych is the manager of Standard Oxfam Shop at Chorlton, Manchester, UK. He has been working there for last 3 years in the same position. Before joining there, he used to work as a Shop Manager at a shop in Withington.

5.2.8.4 Issues Associated with Textile Crafts

Following Trends or Not

According to Marek, Oxfam sell textile crafts throughout the year. They receive a batch of specific Christmas crafts before Christmas, but the majority of textile crafts are sold throughout the year. The shop gets those items from product supply team twice in a year, and the continuation of selling left over items in next season is decided by the Manger of each shop. Some managers prefer to mark down the price or put items on sale after each season. Usually the left over items are sold throughout the years in the shop where Marek is working now. The products in Marek's shop are

not sold in reduced price after each season except some Christmas products or expensive fair trade jewellerys. Those left over items are put in the basket underneath so that customers can have a look through along with the new batch of products.

Competitive Price

According to Marek, the craft textile products are more expensive than mass manufactured products and customers are interested to buy fair trade products. However, he does not have access to the information about the mark up of the products in his shop. As he stated, “...the items that delivered to the shop, they all go on a category on the till called ‘new product’. At the moment, there is no way to separate them and see from the till what items being sold, what aren’t that has been introduced on all new product items will be barcoded. The only way at the moment is through the stock desk; see how much things are sold.” Again about the mark-up of the textile craft products he mentioned “...that includes all kind of factors, that includes the wages of the people on new product team, includes all that kind of overheads, like of delivery”.

Quality of Textile Crafts

When Marek was asked to share his experiences and reasons of having customer complain or refund on textile crafts because of quality issue, he replied that he never had experienced anything like that.

5.2.9 Interviewee 6- Dr Mahmudul Akonda

5.2.9.1 Overview

A Skype interview was conducted on January 21, 2012 from 9am to 10am. The full interview was recorded with the PrettyMay software and stored for the research purposes. The objective of the interview with Dr Mahmudul Akonda was to know an expert’s opinion on the preferred strategy and approach for Bangladeshi textile crafts in global market.

5.2.9.2 Company Details

Name of the Company: Tilsatec Ltd. (part of Sirdar Spinning which was established in 1880)

Size of the Company: Approximately 100 employee

Size of the Company: Flanshaw Lane, Wakefield, West Yorkshire, WF2 9ND, UK.

Email: info@tilsatec.com

Phone: +44(0)1924 375742

Tilsatec is a division of Sirdar Spinning Limited that was established in 1880 and mainly based in West Yorkshire. It is a leading supplier of advanced textile products and specialised in manufacturing high performance Personal Protective Equipment (PPE), hand and arm protection equipment (<http://www.tilsatec.com>).

Their main collection of product called 'Rhino' is the range of protective gloves and sleeves offers a broad range of protective solutions including extreme cut resistance and thermal protection for many industrial sectors like glass, metal fabrication, automobile, assembly and food industry. Moreover, Tilsatec have a broad spectrum of manufacturing capabilities to provide a number of high performance, engineered yarn for the telecommunication, aerospace and transportation industry.

5.2.9.3 Interviewee's Background

Bangladeshi born British researcher Dr Mahmudul Akonda completed his graduation from College of Textile Technology in Bangladesh, where he also worked as a lecturer for three years. Currently, he works in Tilsatec Ltd in UK for last 2 years in the position of Composite Development Technologist. During his MSc Textile Science and Technology from the University of Bolton, his research was mainly about fibre-reinforced composite materials and fire retardancy of polymer composites. He completed his PhD from the same University in 2007 on fibre reinforced transparent glass-matrix composites; afterwards worked as a research fellow at University of Leeds for 2 and half years. Within this time, he has published a number of papers in international journals and patented his work.

5.2.9.4 Overview of Bangladeshi Textile Industry

Prospects of Textile Crafts of Bangladesh in International Market

During his last visit to Bangladesh, the interviewee Akonda has been to local outlet of Aarong and surprised to see nice looking textile crafts in the store and the development in recent years. He also had experience of visiting London store of Aarong. He said that as they import these craft materials from Bangladesh and selling it here in London in a competitive market environment, there must be a good demand for these Bangladeshi craft products in UK and internationally. Therefore, they are surviving and continuing their business very well for a long time. In addition, a large number of factories and NGOs have joined these industries to lift this sector by providing loans and funds for poor village artisans. These industries have already started exporting their craft materials in international market. However, it needs concentration on creativity and experimenting to attract the international market more.

During the discussion about limitation of this industry in Bangladesh, Akonda said he does not feel any limitations as the government is encouraging the entrepreneur and providing support for exporting their products. Moreover, Bangladesh is blessed with resources for manufacturing craft based textile products. He especially mentioned the finer quality and delicate look of 'Jamdani' that Bangladesh is already exporting.

Designer as a Profession

According to Akonda, textile industry was run by unskilled people twenty years ago; but for last ten years textile graduates and diplomas have been working in this area. In addition to the industrial textile manufacturing, they are contributing to the handloom production as well. However, in designing section, the knowledge about international market is absent. In recent years, lots of design institutions have been established, who are also teaching the village craft artisans; but still required more skilled people in design profession.

According to Akonda, there are large numbers of designer working in the buying offices to produces designs for industrial apparel textiles. Alternatively, the buyer sends specific designs for the production. Therefore, he suggested to follow the same process for craft products; either designed by Bangladeshi designers or following the buyers design. However, the idea of craft designer is very new in Bangladesh. No attention was made for the design profession in craft textile sector, as it was not considered as a profitable one. Recently, big enterprises have started concentrating and developing this profession and some universities are offering degrees on design. However, the number is still few considering the demand.

5.2.9.5 Preservation of Traditional Design of Bangladeshi Textile Crafts

Preservation of Traditional Design Verses Buyer's Demand

Akonda preferred maintaining traditional designs and motif originated from Bangladeshi culture, rather than concentrating on buyers demand. As he told from his personal experience, when he goes abroad, he always wants to buy something particularly originated from that particular place. Therefore, national design and local motifs should get the first preference, so that it can attract tourist and people from other culture.

Strategy for Mass Production to Benefit Bangladeshi Textile Crafts

According to the interviewee Akonda, it may depend on the machines to some extent for commercial scale production of craft products depending on the product type and design. However, as manpower is easily available at lower wage rate, Bangladesh should continue the production of textile crafts based on the manual process; even for mass volume orders. Moreover, a craft product gets an emotional value for its handmade production, and its unevenness and uniformity caused for manual production. In addition, less investment for machineries purchase will encourage the growth of this sector in a developing country like Bangladesh. Furthermore, Akonda specially emphasised on the use of sustainable raw materials for craft production. He also stressed on the necessity of concentrating on research, product and design development to attract customer with innovative products, and find the most profitable product range for Bangladeshi textile craft industry.

Strategy to Preserve National Design in International Market

When a customer purchase a craft product; the introduction of that product, its origin, history, traditional meaning, raw materials used and production process is not only the way to promote that product but also it can lead to the preservation of that tradition and culture. Otherwise, it would be hard to differentiate the products from that of neighbouring countries for its cultural, material and design similarities. For Bangladeshi craft products, customer may assume a product to be originated from India, as those are well-known in international market. For this purpose, Akonda's opinion is to provide an idea about the product on its label which may contain the information like country of origin, origin of design, source of raw material used. Moreover, if the product is eco-friendly, mentioning about that will create an appeal to the customer.

5.3 Conclusion

This chapter has presented summaries of the raw data collected and an initial examination of the interview results. The following chapter six presents a deeper examination of the results with a view to comparing with the issues found through the literature review.

CHAPTER 6 – RESEARCH FINDINGS

6.1 Introduction

This chapter summarises the primary research findings and discusses them within the contexts of literature review and research aim and objectives. The chapter is structured in the following way:

6.2 refers to the research aims and objectives,

6.3 identifies the issues arising from the literature reviews from chapters 2 and 3 of textile crafts and the global supply chain for textiles and apparel.

6.4 presents the main findings from the interviews

6.5 identifies the supply chains for Textiles in Bangladesh

6.6 discusses the issues arising from the interview analysis.

6.2 Aims and Objectives

The primary aim of the research was to investigate the implications of incorporating Bangladeshi textile craft into a global fashion supply chain. The objectives of the research were to:

- Conduct literature review to understand Bangladeshi textile craft industry and the global supply chain.
- Conduct in-depth interviews with the people in supply chain from craft producer to retailer to:
 - iii. Outline and understand the mechanism of a global apparel textile supply chain and
 - iv. Identify the constraints regarding incorporating the Bangladeshi textile craft industry into the existing global supply chain.
- Compare and contrast the literature review with research findings to make recommendations for a supply chain incorporating the textile craft producer.

6.3 Literature Review to Understand Bangladeshi Textile Craft Industry and the Global Supply Chain

From the literature review in chapters 2 and 3, it was identified that the textile craft industry of Bangladesh has a glorious history that has almost disappeared since the industrial revolution. The mass market apparel industry within Bangladesh contributes a major share of the national revenue. Textile craft, however, is just surviving in remote villages, unable to compete and develop through lack of access to finance, and limited access to formal and informal training for textile product design development. There is interest to sustain and promote Bangladeshi textile crafts and some small boutiques and charitable organisations export the textile craft products through their own supply chain. Textile craft production is essential not only from a historical and cultural perspective but it also provides an income for many of the rural poor and specially women.

Through the literature review on the textiles and apparel global supply chain, major issues identified were: organisation of textiles supply chain, buyers and manufacturer's interest in exporting textile craft products from Bangladesh, introduction and communication between the buyers and manufacturers, selection of textile craft designer for export market, preservation of traditional product design, competitive price, lead time and quality of the products.

6.4 Major Findings from the Interviews

Data was collected through interviewing mainly in January and February 2012. As described in Chapter 4.6.2, three of the interviews were carried out over Skype, one was face to face interview and two were telephone interviews. For interviewing people in Bangladesh, morning time was selected as calls were made from UK due to the six hours' time difference and taking into consideration the busy times at the work place at the end of the day. Interviews were conducted with members of a conceptual supply chain for developing textile crafts products for an international market. The interviewees are listed in Table 6.1 and a brief explanation for having interviewed them.

Table 6.1 List of Interviewees

Interviewee	Role in craft production	Essential reason to interview
Nurzahan	textile craft manufacturer in Bangladesh.	to understand the barriers to export the textile craft products from Bangladesh, and to understand the mechanism of their existing local supply chain.
Ferdous Chowdhury	senior officer in the export department of textile craft manufacturer and retailer in Bangladesh	to understand the current global supply chain of Bangladeshi craft products, and constraints on exporting textile crafts from Bangladesh to global market
Faridur Reza Sagar	merchandising manager in a textile sourcing house in Bangladesh	to understand the international buyers' interest in exporting Bangladeshi textile crafts in mass volume and constraints in developing a global textile supply chain
Nasrullah Khaled Pablo	buyer for a mainstream apparel company in the UK	to understand international buyers' interest in importing Bangladeshi textile crafts in mass volume and constraints in developing a global textile supply chain for this industry and its extent.
Marek Derych	employee of a craft retailer in UK	to acquire a knowledge about customer experience, impression, attitude and opinion about textiles crafts and the experience of shop manager on those products.
Mahmudul Akonda	researcher, expert and textiles teacher from Bangladesh	to get an expert's opinion on the preferred strategy and approach for Bangladeshi textile crafts in global market

From the analysis of the interviews it was observed that artisans like Nurzahan get orders through networking with other artisans or 'mahazon'; Aarong, a major textile craft retailer in Bangladesh, first introduced to international buyers through its mother company BRAC. Even the industrial textile suppliers start their business through a reference from someone who is already involved in the business. Therefore, to incorporate small business like textile craft into a global chain proper networking and communication strategy is required. Participation in the international trade fairs and exhibitions, communications and presentation of the products to the people of international sourcing houses and ambassadors of the countries interested in importing textile crafts from Bangladesh are also recommended from the analysis of the interviews.

6.5 Supply Chains for Textiles in Bangladesh

6.5.1 Supply Chain for Textile Crafts to Reach Local market

The supply chain for textile crafts to serve local customer, illustrated in Figure 6.1, was obtained by analysing the data collected from the interview of Nurzahan.

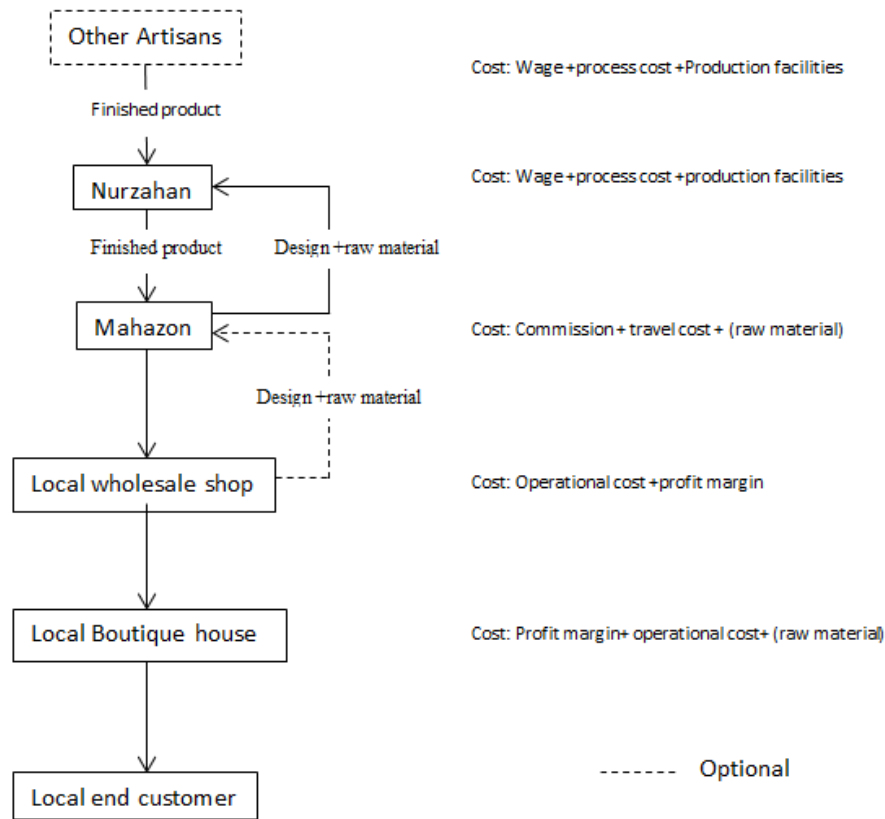


Figure 6.1 Supply Chain for Textile Crafts to Reach Local Market According to the Data Collected from the Interview of Nurzahan

According to this supply chain, Artisans like Nurzahan receive raw materials, design and wages per piece from 'mahazon', and hand over the finished goods to him after finishing the jobs. They sometimes engage other artisans to do craftwork for them and pay them without any commission. After receiving products from these artisans, 'mahazon' sells those to wholesaler. From the experience of living in Bangladesh for 25 years as a citizen and regular customer of local boutiques, the researcher found that the small local boutique shops buy end products from these wholesale shops and sell them with their brand label. However, some of them do direct business with 'mahazon' by providing them raw materials, design and their own brand label.

The Literature review mentioned in 3.6.3.1 of Chapter 3 (Mathews & Hardingham, 1993) suggested another supply chain for textile crafts that serves local customers, which is illustrated in the Figure 6.2.

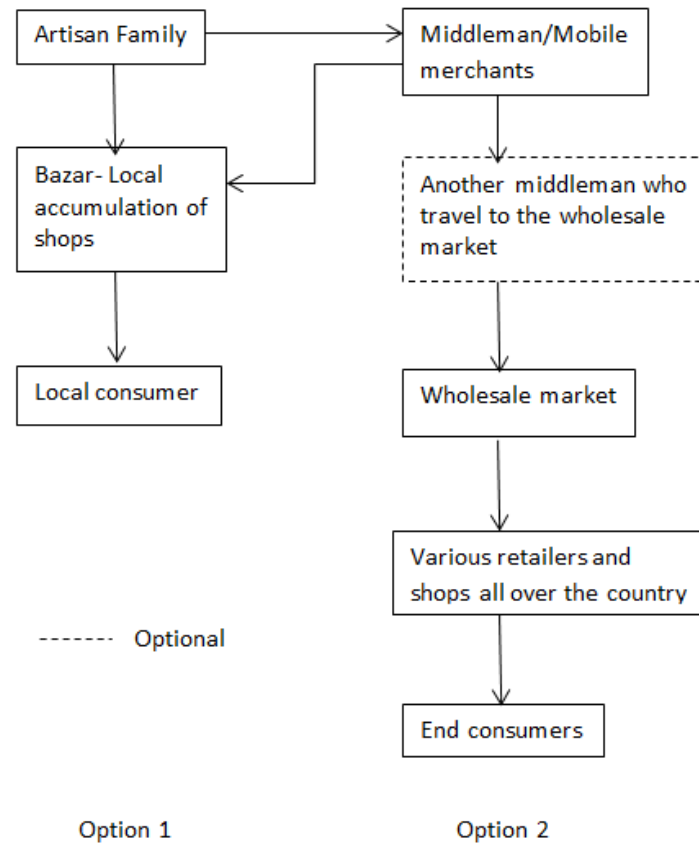


Figure 6.2 Supply Chain for Textile Crafts to Reach Local Market, According to the Literature Review (Mathews & Hardingham, 1993)

According to this supply chain, the artisans sell their products at a bazar (please see glossary); and the local consumers buy these products from that bazar (referred as option 1 in figure 6.2). Alternatively, middleman or mobile merchants go to artisan's place to buy their products (referred as option 2 in figure 6.2). Sometimes, another middleman may involve buying these products; particularly when the production site is at rural place. After buying the products from the artisans, middlemen travel to wholesale market to sell those products. The retailers and boutique shops from all over the country buy the products from wholesale market to sell those to final consumers. This supply chain is mostly dominated by the middlemen who get maximum profit. Sometimes the payment for the actual craft manufacturer is determined by the middlemen. However, the contribution of the middlemen is still significant as most of the artisans live at rural areas far away from the wholesale market, and sometime middlemen provide running capital and raw materials.

The option 1 in the supply chain in Figure 6.2 is mainly applicable to reach to the customers who live in the same or nearby local area, where the artisan lives. The target customers are poor to middleclass people who are not very much fashionable, whereas option 2 is more applicable for the supply chain that reaches to the customer all over the country and mostly in the metropolitan cities. Therefore, the target customers for option 2 are middleclass to rich people who are fashion

conscious. They are capable to buy expensive branded products. The structure of the supply chain that researcher obtained from the interview of Nurzahan match mostly with option 2. However, there was no extra middleman involved in that supply chain, as Nurzahan lived in the major metropolitan city, and no long distance travel was required.

6.5.2 Supply Chain for Textile Crafts to Reach International Market

From the data collected from interviewee Ferdous, three types of supply chain were obtained for the products of craft retailers like Aarong, who serve both national and international market. Option 1 is currently serving the niche market; mainly Bangladeshi consumers who live abroad and some other international customers who want to buy a souvenir of Bangladesh. However, Aarong is interested to attract broader range of international customer for this particular type of supply chain. Option 2 serves international customers but the products are sold on buyer's brand name and more adapted to meet buyer's requirements. Option 3 refers to the supply chain that serves local customers through Aarong's own retail shops situated in Bangladesh.

This privately built supply chain of NGOs/ATOs benefits with the elimination of commission and running cost of the sourcing houses and buying houses. However, it requires big capacity for running all the supporting activities like financial support and training. Moreover, this own-built supply chain is designed to serve a limited number of customer ranges of international NGOs/ATOs only.

There are very few organisations like Aarong, Heed Bangladesh, Grameen Uddog available in Bangladesh, who have capacity to build their own supply chain to serve international market.

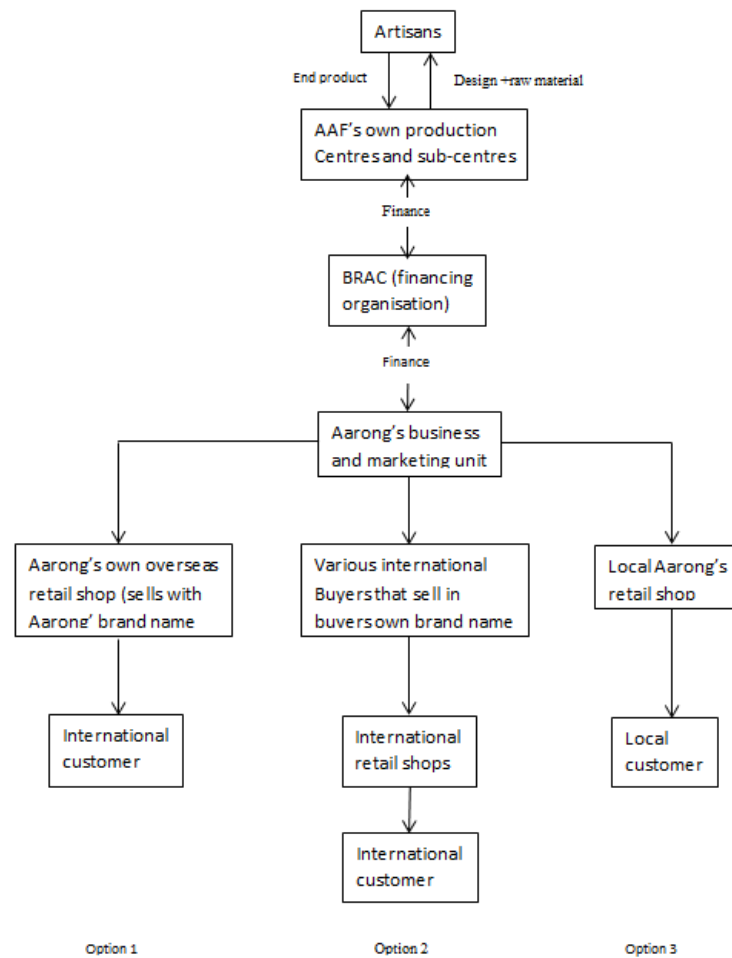


Figure 6.3 Supply Chain for Textile Crafts of Aarong, According to the Data Collected from the Interview of Ferdous

6.5.3 Supply Chain for Industrial Textiles to Reach International Market

The structure of the supply chain for industrial textiles is obtained from the data collected from the interviewee Sagar and Pablo, illustrated in Figure 6.4. The difference between the supply chains obtained from these two interviewee is that C&A runs their own sourcing house called Mondial orient Limited located at sourcing country, Bangladesh and the buying house is located overseas. On the other hand, Breeze International operates their buying and sourcing activities, and communication directly from their overseas office. The reason of the structure being like this, perhaps that C&A has a big market at various European, Brazilian and other countries. They coordinate their own sourcing offices located at various supplying countries, and buying operations are controlled at their main buying houses. Whereas the sourcing of Breeze from Bangladesh is limited, and they serve UK middle aged women consumer groups only.

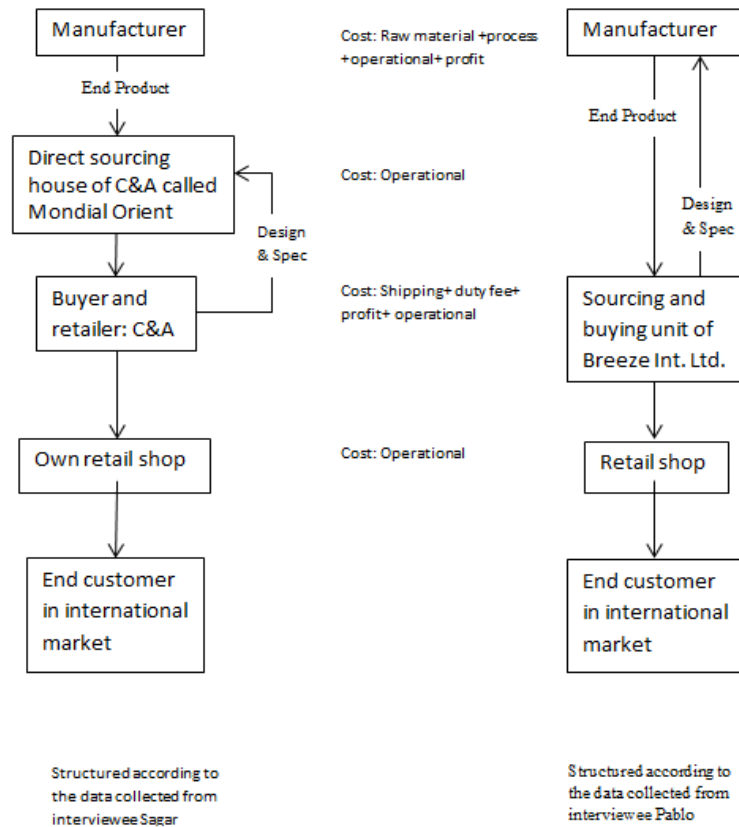


Figure 6.4 Industrial Textile Supply Chain in Bangladesh, According to the Data Collected from the Interview of Sagar and Pablo

From the literature of Gereffi and Frederick (Gereffi & Frederick, 2010), the structure of international textile supply chain refers to direct and third party sourcing, illustrated in Figure 6.5. In direct sourcing, a retailer has their own sourcing office located at supplying country, whereas for third party sourcing, a sourcing agent source products for various retailers.

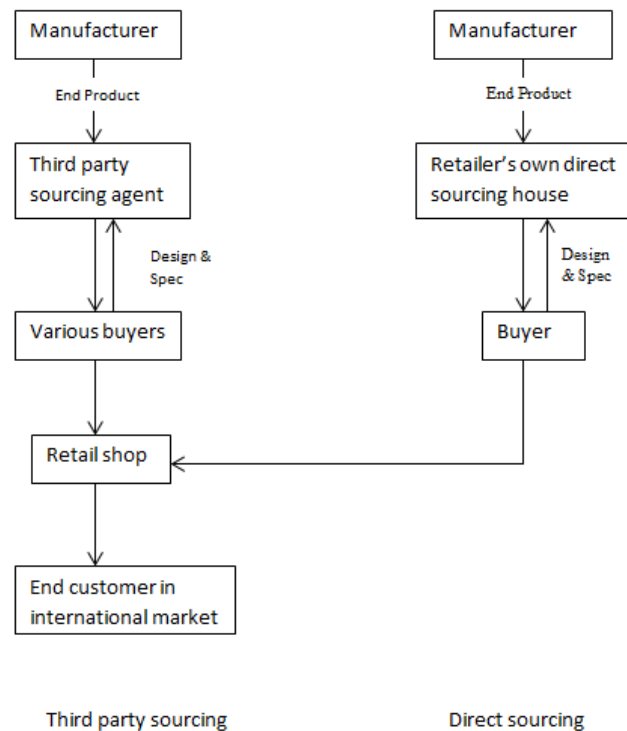


Figure 6.5 Industrial Textile supply Chain in Bangladesh, According to the Literature Review (Gereffi & Frederick, 2010)

The structure of the supply chain obtained from the analysis of the data collected from interviewee Sagar and Pablo is similar to the supply chain found in literature for industrial products (Gereffi & Frederick, 2010). For improving the capabilities of the sourcing organisations and get more control over suppliers, direct sourcing has become a trend for textile sourcing. Moreover, physical presence of the sourcing organisations can offer direct relationship with the manufacturers (Burns & Weiner, 2011).

6.6 Key Issues Arising from Analysis

Key issues include:

- The existing supply chain organisation and demand for an integrated value chain
- Buyers' and Manufacturers' Interest in Forming an Integrated Supply Chain for Bangladeshi Textile Crafts and Current Situation
- Introduction and Communication within the Supply Chain
- Designer for Bangladeshi Textile Crafts
- Preservation of Traditional Design and Strategy to Adopt

- Competitive Price for Bangladeshi Textile Crafts
- Lead Time for Textile Craft Products of Bangladesh
- Quality of Bangladeshi Textile Crafts

6.6.1 Existing Supply Chain, Its Organisation and Demand for an Integrated Value Chain

In Bangladesh, the major craft business are mainly supported by NGOs (please see glossary), who mainly focus on rural development. These NGOs work with low-income craft producers for craft development and marketing of their products (Knutslie & Thommessen, 2003). If we look at the organisations that are currently exporting textile crafts in large volume, from the literature review, we found mainly the name of Aarong, Grameen Uddog and Heed Bangladesh.

According to the promotional literature, Aarong who is currently exporting in Europe, North America, Asia and Australia, is a program support enterprise of BRAC; it has a backward linkage to other BRAC programs (Aarong promotional literature, please see appendix 13). BRAC's major operation is about microcredit and poverty alleviation (foreignpolicy, 2008). Ayesha Abed Foundation (AAF) is the production unit, where Aarong buys all the products produced by women under AAF (Aarong promotional literature, please see appendix 12). In addition, 'Grameen Check' is a Bangladeshi brand exporting to North America and Europe as well as retailing locally. Their manufacturing unit is called 'Grameen Uddog'; whereas finance, promotion and marketing of the products are executed by 'Grameen Shamogree'. They work hand in hand with Grameen Bank (grameenbank, 2011). The Grameen Bank is a microcredit bank which is owned (95 percent) by the poor borrowers (8.35 million) of the bank. Similarly, HEED Bangladesh, which is the parent organisation of Heed Handicrafts, is a partner NGO of Oxfam Fair Trade (Hopkins, 2000). They export their handicraft products including handloom textiles to 50 buyers in 14 different countries, who are mostly Alternative Trade Organisations (ATOs) (please see glossary) (Batchelor & Webb, 2002). They are exporting around 64% of their products to fair trade organisations abroad.

Therefore, it has been observed that the textile craft manufacturers, who are already successful in exporting their products, are linked with infrastructure support. The financial supports could be the primary reason, as every year traditional weavers are leaving their profession due to lack of running capital (Raihan, 2010). The situation has forced them to take loan from the local money lenders at a high rate of interest and selling their products to a middleman, while suffering from high cost of raw material. Therefore, the microcredit loan from Grameen Bank offered a solution to that problem. On the other hand, NGOs like BRAC and Heed Bangladesh are providing the raw materials to work.

Secondly, as the rural weavers generally learn weaving traditionally, there is always a lack of proper technical training (Raihan, 2010). The NGO's provide technical training as well as contributing to the very important final stages: promoting, distributing and building other forward stage activities of the supply chain for local and international market. As Ferdous said during interviewing for this research work, Aarong was first introduced with the buyer through the connection of BRAC. Aarong has four export departments: "export communication, export production, export commercial and export packaging". Export Communication is responsible for communicating and negotiating with existing and potential buyers. According to Ferdous, Aarong is a "well-equipped supplier with quality supply chain". Therefore, it seems that an integrated supply chain is particularly necessary for those private entrepreneurs who are deprived of a big infrastructure support. Boutiques established by private entrepreneur like 'Aranya' (kanthathreads, 2011), and an umbrella organisation of research and campaign like 'Prabartana' (Prabartana, No Date) found it too expensive to participate in the international trade fairs and exhibitions, and instead engaged an agent to get connected with the international buyers (Knutslien & Thommessen, 2003).

On the other hand, self-funded Bibi Production is successful in exporting the handloom products made by the artisans of Bangladesh. The brand has been devised and owned by the internationally renowned model and designer Bibi Russel who had her contacts with the buyers through her professional experiences of working with the renowned brands.

Most of the customers of ABH are alternative trading organisations of its 44 buyers in North America, Europe, Australia and Asia. Similarly, HH sells 64 % of its products to fair trade organisations in international market and none of its customer is a commercial buyer (Hopkins, 2000).

Therefore, the ATOs/NGOs offer the producers or small entrepreneurs access to finance through microcredit loans or interest free credit; facilitate provision of technical assistance, on-job-training in specialising with design specialists assisting, organising the producers, fixing the prices, healthcare and education support. The forum like ECOTA has a voice in lobbying government on issues related to alternative trade. Since they are in business with the craftsmen for a long time, they can offer a good management of textile craft production with their long term experiences and understanding of this industry.

6.6.2 Buyers' and Manufacturers' Interest in Forming an Integrated Supply Chain for Bangladeshi Textile Crafts and Current Situation

From the buyer's perspective, according to Pablo, global market is interested to buy textile crafts from Bangladesh if they can get the products at a competitive price. In contrast, Sagar stated that, though there is a big market for the textile crafts and Bangladesh can provide cheaper price, but the buyers tend to source the products from the other competitive suppliers like India or China as they can get a huge variety in an economy product range. Moreover, they have already developed the craft industry to serve their internal demand, they are now easily moving beyond the domestic market with the benefit of long term business experience and understanding. On the other hand, as Sagar mentioned, only few craft product suppliers have the capacity to meet big volume demand, which is a basic requirement to enter into the mass market.

From the suppliers' perspective, as mentioned by the interviewee Ferdous, the textile craft industry is very much interested to move beyond the local market. Therefore, textile craft producing organisations established an association where small boutiques have joined with the purpose of building the capacity, and markets of their products for international market.

6.6.3 Introduction and Communication within the Supply Chain

In the manufacturer level, according to Nurzahan, personal communication with the artisan community is usually the way of first introduction. The third party-'mahazon' get introduced with other artisans through an existing supplier i.e. artisan; after that they communicate directly. The artisans like Nurzahan are not involved with any co-operative society. However, from the literature (BHB, 2011), it has been observed that majority of the artisans from Bangladesh are members of some organisations like co-operative society.

Bangladeshi craft product suppliers get introduced with the international buyer in various ways. As interviewee Ferdous stated, the first international buyer got introduced with Aarong through its mother company BRAC in 1986, which was internationally well renowned then. Now Aarong is communicating with buyers through their business team successfully.

On the other hand, Sagar stated that in mass manufactured industrial apparel sector, the first initiative is usually taken from the suppliers' side to communicate with the international buyers, and usually through the reference from the people already involved in the apparel business or through the information from the media. Similar information was given by the buyer Pablo.

However, Sagar suggested that textile craft suppliers, who want to get into the export market, should participate in international trade fairs and exhibitions. Moreover, he recommended them to

invite the ambassador of those countries who imports such products. Communication with the trading companies or embassy might help to get an opportunity of sales presentation in front of the international buyers or the professionals of sourcing houses. In addition, Pablo suggested the craft producers to make their own websites or at least get access to the internet to know about the potential buyers. Overall, for successful export marketing of craft products (Benjamin & Malcolm, 1994), integrated export development plan, effective international promotional strategy and campaign is essential. Therefore, ministry of tourism, local tour operating companies, international and national airlines, hotels, restaurants, banks, shipping companies can also participate in the campaign.

6.6.4 Designer for Bangladeshi Textile Crafts

An experienced design team is necessary when an apparel supplier works for a renowned international clothing brand (Mirdha, 2011). According to Akonda, in Bangladesh the idea of apparel design, especially for textile crafts, is very new. This field has not been developed thus far as it was not considered as a profitable sector before. Recently, big enterprises started concentrating; investing money and developing the design professionals and some universities are offering degrees on design. However, still they are few in number considering the demand. Although Mirdha stated that (Mirdha, 2011), the industrial apparel manufacturing companies do not have intention to invest enough money to develop design department. A few industrial apparel manufacturing companies are (Mirdha, 2011) working to produce designs locally and the qualified designers from local educational institutes are joining the industry. The international buyers are satisfied with their performances, and they are successful in competing with other foreign designers. In addition, there is not enough rich resources available to arrange events for the designers where they can participate with other international designers get inspiration and learn from other renowned designers work. Moreover, it is difficult for the weavers who lived in the villages to make goods according to the tastes of the customers at a global level (Islam, 2004). According to Akonda, at present there are two strategies exist in the industrial apparel industry of Bangladesh; either design team of the apparel sourcing offices create designs or the buyer sends specific designs for the production. In most cases, the buyers basically provide the designs (Mirdha, 2011). Akonda suggested any one of these two strategies can be suitable for textile craft industry. In this regard, 90% of the export items of HEED Handicrafts are designed by their local design team based on the customer response to their own craft products and market trends in Europe and USA. On the other hand, for perhaps 10% of their export products, the design is initiated by the overseas buyer who sends drawings or just photographs or magazine cuttings showing similar desired products. HH produces some products designed according to the traditional designs for the local market (Batchelor & Webb, 2002).

As a craftswoman Nurzahan stated, she gets the designs mostly from the company she works for. However, sometimes she makes her own designs as she learns from other artisans, sometimes copies them or creates something similar with her own creativity, or sometimes she gets ideas from random sketches or photos. However, apart from the technical skills, awareness of the customer demand is important. Humphreys mentioned about the skills required for traditional cloth production in north and north-east Thailand (Humphreys, 1999) which is represented in Table 6.1.

Table 6.2 Skills Required for Traditional Cloth Production (Humphreys, 1999)

Mathematical Skills	Technical and Scientific Skills	Artistic Skills
Practical knowledge of: Geometrical and symmetrical properties of patterns, measurement of fabric, loom, designs, number of threads per pattern and fabric	Practical knowledge of: Lifecycle and care of silk worm and cotton plants. Properties of natural and chemical dyes. Properties and limitations of the loom. Weaving and spinning color mixing theory. Dyeing techniques.	Practical knowledge of: Design and patterns. Colors.

For textile design, there is very limited scope for proper research in Bangladesh. Although, some of the designers like Bibi Russel are working to develop textile designs with cotton, khadi, Jamdani, silk and jute. However, these developments are done by keeping the traditional way of weaving in mind or the ingredients that the village artisans do not use are not included in designs (Islam, 2004). However, some organisations like Oxfam Fair Trade, are taking initiative to provide on-job-training for Bangladeshi designers (Hopkins, 2000). Some of the textile craft manufacturers like Bibi Production and HEED Handicrafts design the products according to the trend of each season (Hopkins, 2000; Islam, 2004). Although, HEED Handicrafts does some core designs to sell throughout the year (Hopkins, 2000). Marek's experiences in Oxfam shop that the textile craft products are bought by customers all around the year even from the last season's left over stock.

Therefore, design as a profession is at developing stage in Bangladesh. However, situation is changing rapidly; as the prediction shows that there will be a good demand for these professionals in near future because of the growth of textile business in Bangladesh. On the other hand, for the tradition and culture based craft products, there is an advantage that customers buy those products

because of the originality of design. This phenomenon might therefore benefit the industry with the flexibility as the designers are not required to follow current trend always.

6.6.5 Preservation of Traditional Design and Strategy to Adopt

The market of craft product is mostly driven by the quality and design along with their artistic and historical significance and the unique characteristics of the artefacts. The original traditional designs can be modified or modernised to attract the customers of the international market and to serve contemporary market's demand. However this move should permanently be guided by the specialisation in market trends, which may be acquired through contact with specialised brokers or buyers at national and international fairs (UNIDO & UNESCO, 2007). According to Akonda, the design of Bangladeshi crafts are required to be creative and developed by their own designers to compete in global market. Therefore, for Bangladeshi textile craft industry, the essence of handmade production need to be preserved as the customers are more attracted to the handmade craft products. As cheap labour is available in Bangladesh, Akonda recommended manual production of textile crafts with traditional appearance. Moreover, he suggested using of sustainable, eco-friendly, bio-degradable materials that would help to attract the customers at international level. Moreover, he recommended conducting plenty of research, survey and study to understand the designs available in international market of these products and its quality; then to develop own product that can attract international market. These recommendations were supported in a paper by UNIDO and UNESCO (UNIDO & UNESCO, 2007), where awareness of consumer taste and adapting with changing trends were addressed. These information's are required to be available to the producers and to those agents, who provide technical and business support to the artisans, which is one of the major roles of the craft Information system, and the main requirements of the value chain of craft products. Similarly, Benjamin and Malcolm (Benjamin & Malcolm, 1994) has admitted the importance of surveys, research and statistics to win the craft market.

However, the risk of these creative products is often that the major asset of these enterprises is its intellectual property, whereas the intangible content of traditional products is considered as public asset. These products are open for the public to be enjoyed without depriving its possessor of its use. Although, the degree of this uncertainty is comparatively lower for crafts sector as it resembles in the mainstream business sector (Kamara, 2008). To preserve the intellectual property to some extent, Akonda suggested mentioning of the origin of products and its design, and making the origin more visible by attaching a symbol of Bangladeshi flag to the label of the product. Henrici (Henrici, 2003) mentioned about the similar type of labels which is illustrate in Figure 6.6.

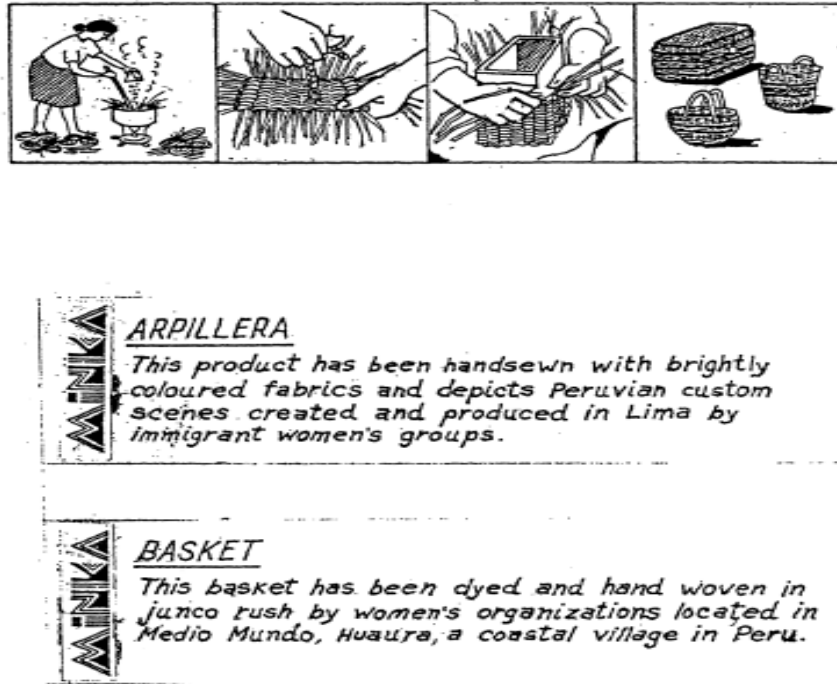


Figure 6.6 Product Labels that Graphically and in English Text Represent the Making of Arpilleras and Baskets (Henrici, 2003).

In this regard, the Bangladeshi enterprises of craft products, which are currently in export market, are careful enough to preserve the originality of their traditional product. As, when Bibi Production designs for the international market (Islam, 2004), they tend not to change the traditional way of weaving and all of their ingredients are from villages, and they precisely maintain the quality ensuring that the product does not contain any internationally banned chemicals. On the other hand, Nurzahan basically get the designs from organisation she works for and whenever she designs basically follow the others artisan's work, that is how she is playing her part in the community that preserves and transfers the skill from generation to generation. Apart from that, various organisations and museums are working for the documentation of traditional textiles, their manufacturing techniques, and to preserve the photographs, samples and books about traditional textile craft (Amin, 2006).

6.6.6 Competitive Price for Bangladeshi Textile Crafts

By analysing the collected data and literature it has been understood that, it is very difficult to mention an approximate price for a garment without mentioning a specific product, as it heavily depends on the negotiation and several parameters that influence the price; no business person feels comfortable to mention an exact price range. Moreover, it is more difficult to predict the tentative price of a textile craft product, for a professional like Sagar who was entirely involved with mainstream apparel sourcing only. According to Ferdous, as Bangladesh craft industry is at the stage

to promote their products in the international market, they tend to keep the price to minimum. After calculating the basic cost for a product, Aarong adds a little mark up to that. However, Benjamin and Malcolm (Benjamin & Malcolm, 1994) stated that though some of the craft products find a place in lower price mainstream retail shops where cheaper price is the main selling point of the product; experience shows that it is beneficial for the craft industry to promote quality products at higher end of the international market (i.e. higher price and better quality). However, it is better to have the capacity to serve a wide price range with variety products. According to Marek, the textile craft products that are sold in UK are more expensive than mass manufactured products, and the customers are interested to buy fair trade products.

Ferdous, who is working in the export department of a Bangladeshi craft product retailer, and the interviewee artisan Nurzahan mentioned that the type and density of craft work is taken into account during the pricing of a product. In the same way, Sagar who sources mainstream apparel products from Bangladesh for international customers considers various factors, such as type of the material used, type of the product produced, production rate, and the number of people required for the production.

Moreover, Nurzahan mentioned that ‘mahazon’ may get a commission for the embroidery on each piece of ‘saree’, and he adds the travel cost as well. Therefore, the presence of a Middleman within the supply chain adds an additional cost. From a private conversation, it has been noted that companies like Aarong profits around 4-5% after calculating total associated cost. Moreover, for the speciality of the design of their craft products and traditional adherence, Aarong does not add any extra charge. Basically, the initial price of Aarong’s product is set on the actual craftsmen level, with that they add the cost of local office maintenance, salary for the employees in the local office and designers, VAT and other associated cost. However, the products are comparatively expensive in their foreign franchises, as huge cost is associated with the outlet such as rents, maintenance, utility, salary for the employees. Whereas the buyer of mainstream apparel products, Pablo, who gets the manufacturing cost from the supplier and calculates 25-30% profit after considering shipping cost, duty fees and other associated cost, to fix the selling price of a product.

As Ferdous stated, depending on the type and density of craft, selling price of a basic men’s top is approximately five to seven dollar. Whereas Sagar who sources industrial apparel mentioned that, in general they may pay up to 20% more for a textile craft product depending on the order quantity and the product types. To get an idea, Sagar mentioned about an order of 10,000 pieces of basic

men's top which they source at USD 5 per piece; a buyer may agree on a tentative price of USD 6 for similar type basic men's top made of craft materials.

Therefore, it was observed that the elimination of the middleman can offer the reduction of cost. The wages of the craftsmen depend on the intensity of the work. In addition, every firms of the supply chain adds their profit after calculating the cost of running their business centres and retail shops. Moreover, the shipping cost and duty fee is added for exporting the consignment. According to the data gathered for the purpose of this thesis, the tentative price of a basic men's top mentioned by Aarong is USD 5-7, whereas the interviewee working on a mainstream apparel sourcing house stated that they would accept around USD 6 for these type of product. However, the firm on the next step of the supply chain –buying houses will add their profit of around 25-30% on top of this price.

6.6.7 Lead Time for Textile Craft Products of Bangladesh

Shortening the lead time is essential for the fashion industry and it is the most crucial priority task for Bangladeshi mainstream apparel suppliers. In 1980s, the usual lead time in the mainstream apparel industry was 120-150 days for major garment supplying countries around the world, which has been reduced to 30-40 days in current decades. However, Bangladesh improved to some extent; for example 90-120 days for woven and 60-80 days for knit garments (Haider, 2007). Moreover, most of the textile craft products in Bangladesh are woven. Sagar stated from his professional experience as a mainstream apparel supplier that an order of 2,000 pieces of scarf can be dispatched within 4-5 months (120-150 days), as it is a small plain item, that is closer to the lead time mentioned by Haider (Haider, 2007). However, an order of 30,000 pieces of the same product would take at least 6-8 months (180-240 days) because of large volume. Moreover, lead time varies according to the product type, size and its complexity. Furthermore, researcher's experience of working in Bangladeshi apparel sourcing offices agrees the lead time mentioned by the interviewee Sagar. In contrast, according to the interviewee Pablo, who is working in a buying house in UK and source mainstream apparel products from Bangladesh, mentioned that they usually place orders for a lead time of around 9 weeks (63 days). The reason behind the difference of the lead time in mainstream apparel industry mentioned by Haider and Sagar with Pablo is probably because of the difference of the volume of the orders they handle. As, Sagar usually handles orders of around 10,000 to 20,000 pieces per order, whereas this quantity for Pablo is about 6,000 to 7,000 pieces.

However, considering as time consuming manual process, Pablo mentioned, they can extend the lead time up to 1 week extra i.e. 10 weeks (70 days) for an order of textile crafts. Whereas, Sagar stated that the buyer would do the justification by extending the lead time to an optimum standard

level for handmade products. On the other hand, as per the information from Ferdous, Aarong exports almost 95% of their orders within the lead time which is usually three months (90 days) or less regardless of the quantity. Moreover, other boutiques in Bangladesh also can achieve this lead time. Since Aarong gets most of the orders from NGOs and other alternative trading organisation mostly for their particular campaign or programme, it is more likely that their order quantity is not massive enough as it is for mainstream apparel industry. Therefore, Aarong can produce that volume with their existing capacity easily within 90 days, which is close to the lead time agreed by the smaller quantity industrial apparel product buyer Pablo.

Furthermore, interviewing Nurzahan presented a completely different view about the tight schedule to complete a product on time. As she stated, she does hand embroidery only as a part time work, and usually she was not given any fixed time to complete the work. She generally brings an order for a month and whenever she completes she submits her work. Moreover, if she requires getting enough work done within a short time, she involves some more artisans, preferably someone from her family. Moreover, they work till late night if the electricity supply is available. In that case, she has to share her wage among other if she involves someone. Therefore, the scenario shows that, as craft work involves mainly skilled manpower and about 78.4% of the 74.2 million working age population (15-64) are unemployed in Bangladesh (UN, 2005), the craft manufacturing capacity can be expanded by proper training and organisation. Moreover, Nurzahan pointed out a crucial fact that, as the craft work is totally manual work, and the quality depends on the skills and concentration on work; the pressure of dead line might cause degradation to the quality of the product.

Apart from the time involved in the production process, time spent on other processes like product development, conveying information, transportation within the production units are required to be considered. As ferdous mentioned, sometimes after getting an order, the product package might need to be sent off to a remote village of Bangladesh, where they also need someone to explain the technical information in familiar terms to the group of poorly educated craftsmen. Secondly, Nurzahan, does only the hand embroidery on a part of a 'saree', where a different group of artisans with other skills such as hand weaving or hand printing are also involved to complete the entire product. From the literature review, it is observed that groups of craftsmen with different craft skills lives in some specific areas throughout the whole country that also add some extra time to get the whole job done. Moreover, the shortage of the raw materials often causes delay in production process which is very common problem for most of the craftsman (Ghuznavi, no date). In addition, the industry often suffered from political instability and natural disaster. Due to major flood in 1998

and a number of political strikes, local sales of 'Shetuli'- retail centre of HEED Bangladesh decreased by 30% compared to previous year (Batchelor & Webb, 2002). Similarly, the hand woven collections of international designer and model Bibi Russel which was presented in the opening of London fashion week with success could not be reproduced, as almost all the weavers working for her was badly affected by that flood (Culture-and-development, 2008).

Therefore, it has been understood that the total lead time required by Aarong for their textile craft products (90days or less), is very close to as it was expected by the buyers of international mainstream apparel industry (as mentioned by Pablo 70 days). In addition, it matches with the usual lead time of existing Bangladeshi industrial apparel exporter (90-120days for woven, 60-80 days for knit) (Haider, 2007). Moreover, even Aarong could meet lead time which is shorter than the existing Bangladeshi sourcing house for international mainstream apparel market are doing(120-150 days for smaller quantity and 180-240 days for bigger volume). Moreover, Aarong met 95% of their deadlines so far.

In summary, according to the analysis of the collected data and literature, organisations like Aarong are capable of meeting the expected lead time of international mainstream buyers. Though the volume they are dealing currently is not as big as the mainstream apparel suppliers. Moreover, it was observed that there is a scope to expand the capacity by training and organising the craftsmen. On the other hand, for the small boutiques, elimination of the middlemen will save some time consumption. However, the most challenging part for meeting the target time for the textile craft industry of Bangladesh is that the actual craftsmen are very much and commonly affected by the natural disaster and political conflicts, which are hard to protect from. The delay in supplying the raw materials is one of the main reasons for late delivery of products, which supposed to be improved automatically when an integrated supply chain will be built. However, unlike mainstream apparel industry, there might be flexibility for the craft products regarding the lead time, as Marek experienced that, he can sell last season's leftover craft textile products throughout the year.

6.6.8 Quality of Bangladeshi Textile Crafts

The major challenges of working with craftspeople are the issues of quality and on time delivery (Ghuznavi, no date). According to the interviewee Nurzahan, the quality work requires attention to detail and deep concentration. Therefore, if she spends enough time on her work, she can make quality product. In addition, the quality of end products also depend on the raw materials supplied to Nurzahan by the 'Mahazon'. According to the business experience of Oxfam Fair Trade Bangladesh, capacity building activities related to the organisation of the business have relatively

been less frequent; however Bangladesh is an exception in this case. Oxfam promoted ECOTA Forum that provides technical assistance to the manufacturers. Among the two major purposes of capacity building activity within ABH, the first one was contribution to knowledge and skill development. Therefore, with the support from ECOTA, both of ABH and HH have achieved substantial improvements in quality control (Hopkins, 2000). Similarly, Bangladeshi boutique 'Aranya' has been working to promote ecological and commercial benefits of natural dyes on the principal of fair trade (Ghuznavi, no date). Moreover, they offer training for the producers on the quality control of the products. In the same way, Bibi productions assure quality by keeping the ingredients same as the craftsmen of the villages. Moreover, they assure that none of their product contains any chemical that is internationally banned (Islam, 2004). According to Ferdous, Aarong also ensure the quality for the products manufactured for international market set by their buyers of various countries and even of different associations. Moreover, as a member of Fair Trade, they ensure the standard working environment in the production site.

About measuring the quality level of the textile craft products, Sagar stated that, its physical appearance will be the main concern rather than a set guideline. Before testing with the equipment buyer will judge if it is visually acceptable, sellable and usable or not. However, he pointed out that this visual measurement can vary man to man. The buyer of mainstream apparel industry Pablo mentioned that they usually ask for the M&S or Arcadia quality standard for their products.

About the scope for the improvement in quality level, Ferdous stated about the difficulty of maintaining uniformity of handmade products; for example a flower motif by hand can be a bit bigger or smaller. Moreover, working with extremely underprivileged artisan team of a third world country will always leave some drawbacks. He identified the main constraint for producing quality craft product is less educated or non-educated team of craftsmen who are unable to understand the technical information clearly.

The customer responses could give an idea of quality level from practical field. Bibi Production have built such a reputation in the international market that not a single piece has been returned from the customer so far (Islam, 2004). In addition, interviewee Marek, who comes to the direct contact with the end customer, experienced no customer complain on any craft textile product. Moreover, In an customer review of Aarong (http://www.tripadvisor.co.uk/Attraction_Review-g293936-d546308-Reviews-Aarong-Dhaka_City_Dhaka.html), nine customer reviews were found about Aarong; out of which, six customers are not from Bangladesh and found average rating of 3.77, which means quite above than 'average' and close to 'very good'. Therefore, the study present that

Bangladeshi craft industry is developing rapidly to maintain the quality standards to compete in the international market. Though the actual craftsman are deprived of the clear understanding of the technical points, the organisations with whom they are working can help on this regard. Moreover, as the raw materials are supplied to the craftsmen from the organisations, the quality level largely depends on that organisation.

6.7 Conclusion

This chapter has outlined the findings from the research. From the research conducted and the literature reviewed, it was observed that international buyers were interested in sourcing textile crafts from Bangladesh. The current sourcing for textile crafts is from more developed and competitive suppliers such as China and India, as they can offer variety in economic product range. Additionally, from the suppliers' perspective, Bangladeshi craft textile manufacturer and local distributors are keen to move beyond the local market. Key issues from examining the textiles supply chain were:

- The existing supply chain organisation and demand for an integrated value chain
- Buyers' and Manufacturers' Interest in Forming an Integrated Supply Chain for Bangladeshi Textile Crafts and Current Situation
- Introduction and Communication within the Supply Chain
- Designer for Bangladeshi Textile Crafts
- Preservation of Traditional Design and Strategy to Adopt
- Competitive Price for Bangladeshi Textile Crafts
- Lead Time for Textile Craft Products of Bangladesh
- Quality of Bangladeshi Textile Crafts

This will be discussed with a view to developing an integrated supply chain to incorporate the textile craft producers in the final chapter.

CHAPTER 7 - CONCLUSIONS

7.1 Introduction

The chapter is structured in the following way:

7.2 states the main findings from the research conducted

7.3 discusses the issues arising from the interview analysis and develops an integrated supply chain

7.4 compare and contrast the literature review with research findings to make recommendations for a supply chain incorporating the textile craft producer

7.5 implications of the research and the conceptual integrated supply chain

7.6 discusses the limitations of the research and identify future research areas to examine.

7.2 Major Research Findings

This research firstly & foremostly identified that the major constraint in exporting Bangladeshi textile crafts to global market is the lack of proper marketing and promotion of textile crafts to the world market. Moreover, a negligible amount of work is done in the development of textile craft designs targeting the world market.

Secondly, small firms find it difficult to identify a proper buyer for their products and to reach them. Moreover, no institution has been set up, which can facilitate the introduction and communication with an international buyer; moreover, will help to understand the buyer's requirement, policy and export process.

Thirdly, there is a lack of research on international market, domestic capacity, identify the product that has prospect in international market.

Therefore, a general structure of an integrated supply chain is recommended to initiate the development of a structure to solve these issues, which can be applicable for both small boutiques and large NGO based organisations. However, this is a basic structure only; activities can be distributed among organisations for business benefits and according to the appropriateness for firm capacity.

7.3 Issues Arising from the Interview Analysis and Development of an Integrated Supply Chain

Birley and Cromie (1988) stated that (Birley et al., 1991) the entrepreneurs at its early stage of development depend heavily on an informal network of friends, family members and social networks to gather relevant data, whereas in its later stage, entrepreneurs rely increasingly on professional networks which is more difficult to build. Similarly, the data gathered to conduct this thesis, provides evidence of the social and personal networking among 'micro-level' of the producers, and more formal and professional networks are applied at the buyer's end. As Szarka cited Jarillo (Jarillo, 1988), to turn from the 'micro-level' of the entrepreneur to the 'macro-level' of the network as system, the major factor encouraging networking is that it offers firms to specialise in those elements of the supply chain in which they have competitive advantage; and culture those activities in which they are disadvantaged to network partners who do have strengths in those areas (Szarka, 1990). This is akin to the cluster formation as described by Clarisse Beddig (Beddig, 2009).

Networking has taken the attention of the researchers and practitioners (Birley et al., 1991 and Szarka, 1990), as a mechanism for the small business firms to overcome disadvantage of their fragile small size, to reduce uncertainty and to thrive in more competitive market. In addition, information and inter-organizational exchange networks can offer the small business units a supportive environment for mutual gathering of information about the market, access to valuable resources at below-market prices and achieve competitive advantages (Aldrich et al., 1989; Zhao & Aram, 1995), minimised cost, greater efficiency and risk share (Szarka, 1990). Moreover, building and developing relationship with other organisation (Zhao & Aram, 1995) facilitate entrepreneurs to build a positive image and credibility, as well as creating channel and getting customer access. Communication and networking is considered as a strategic action and purposeful activity of the small business firms to get the competitive advantage and essentials to survive and succeed (Szarka, 1990). Finally, networking can be more than a subjective approach and be used beyond the performance and professional objective such as developing and reflecting an identity within the business environment (Littrell et al., 1992). In small-arts business such as craft materials, the economic and objectives are sought simultaneously.

From the research conducted and the literature reviewed, it was observed that international buyers were interested in sourcing textile crafts from Bangladesh. The current sourcing of textile crafts for international market is mainly restricted to more developed and competitive suppliers such as China and India, as they can offer variety in economic product range. Moreover, from the suppliers'

perspective, Bangladeshi craft textile manufacturer and local distributors are keen to move beyond the local market.

An early research of Simmonds and Smith (Simmonds & Smith, 1968) stated that the lack of drive and interest in the owner/manager's attitude towards exporting can be a major factor that influences initiative for export and its consecutive growth. Katsikeas (Katsikeas, 1996) studied both the internal and external stimuli that lead to the motivation of a firm for internationalisation. Although he highlighted the importance of the experience in this regard, he made no mention of the effect of cognitive style on the process. However, Bradley (1984) investigated (Fillis, 2002) the connection between the degree of motivation as a barrier to exporting, cognitive style, and the growth of a firm. In addition, the preliminary findings of a study conducted at the University of Salford on export marketing of engineering industries pointed out the differences in attitudes to internationalisation (Hunt et al., 1967). Moreover, the characteristics of innovators or initiators in exporting are same as elsewhere (Simmonds & Smith, 1968). In this regard, the profit rewarded risk takers with a cosmopolitan background and creative ideas are most likely to be innovative and have positive attitude towards expansion of the firm. Similarly, Hunt (Hunt et al., 1967) mentioned that the lack of dynamic objective and the consequent adoption is the major constraint for exporting, especially in small or medium sized firms. It is applicable particularly, when it is necessary to be based on new products and/or unfamiliar and distant market. On the other hand, Albaum (Albaum, 1993) mentioned that the cultural differences in both macro and micro level in different countries, as a factor which may affect the attitude towards exporting, as it can impact on managerial motivation and their perceptions of export barriers. Finally, Bradley (1984) figured out (Fillis, 2002) motivation along with experience, growth, firm type and exporting behaviour are the most common variables that has been investigated on the regard to export development.

7.4 Compare and Contrast the Literature review with Research Findings to Make Recommendations for a Supply Chain Incorporating the Textile Craft Producer

This study has found that textile craft suppliers would be able to meet the expected quality standard of international buyer if proper technology, training, facilities and organisation are assured. The visual quality examination would be more applicable rather than a performance of quality testing. In addition, though this research has shown that the price can be maintained within the range as it is expected by the international buyers, it would be beneficial for the industry to target for high value market by maintaining the authenticity, and delicate quality of the products. Moreover, the lead time expected by the global buyers seems to be achievable for textile craft products, and being the traditional product there is benefit of being sold throughout the year. Furthermore, there are scopes

to increase the capacity with basic training, small financing and other facilities easily as the manufacturing unit for this industry is not limited within a boundary of a certain location and infrastructure.

Henrici's (Henrici, 2003) study on the craft producers of Peru found that the major customers of crafted products are international NGOs. Similarly, the literature reviewed and data collected identified that textile craft manufacturers, who are exporting to international markets, do so currently through their own supply chain with support from organisations of various NGOs/ATO. The involvement of local boutiques into an international supply chain would also help to reach these artisan groups. In addition, as found in the literature, these supply chains are exporting to international NGOs/ ATOs only. However, it is important enable a wider and larger consumer range to develop a sustainable business industry.

Chapter 6 outlined a number of routes to market for the Bangladeshi textile craft artisans and so coupled with the available literature about textiles global supply chain, a supply chain that would incorporate Bangladeshi textile crafts into a global supply chain is proposed as illustrated in Figure 7.1 with two options of operation

Option 1 would be the joint collaboration of NGOs/ATOs like Aarong with third party industrial apparel sourcing houses, where they would work as business partners and share product design idea and profit margin according to the partnership agreement. In this option of proposed supply chain, NGOs/ATOs would have various production centres at different locations of Bangladesh; will provide raw materials and necessary technical supports to the artisans, who in return would be remunerated for supplying their craft products.

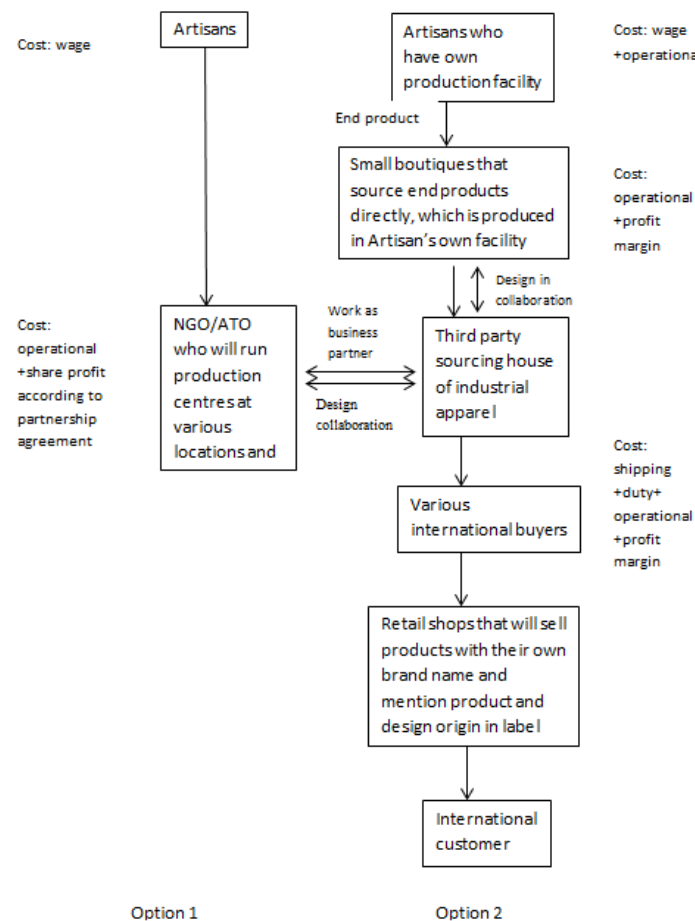


Figure 7.1 Basic Structure of Proposed Supply Chain to Incorporate Textile Craft of Bangladesh with a Global Supply Chain

In option 2 of the proposed supply chain, instead of NGOs/ATOs, small boutiques with similar types of products would jointly form an organisation to buy the textile craft products from artisan's production facility. After that they would supply those to a third party industrial apparel sourcing house. A similar organisation called 'Bangla Craft' has newly been established in Bangladesh as mentioned by the interviewee Ferdous, where small boutiques are the active members. The products may be designed to be traditional or may be produced according to these boutique's or international buyer's design recommendations. The industrial apparel sourcing houses would supply these products to various international buyers who would then sell those to the end users with their own brand name on it, however the mentioning of product and design origin in the product label to preserve the intellectual property of traditional designs to some extent is recommended by the interviewee Akonda, and also mentioned by Henrici (Henrici, 2003).

Option 2 would provide the rural artisans access to market information collected by those organisations, and would help to promote and market their products possibly jointly. The success in exporting not only depends on an individual firm's attempts, but also a wide range of facilities for

shipping, getting access to the market information, finance, insurance, marketing (Tookey, 1964). An integrated supply chain could help the small boutiques provide the logistics and shipping support for international export, where they are deprived of enough hands on experience. In this scenario, the industrial apparel sourcing houses usually undertake the responsibility to attract, communicate with and get introduced an international buyer to small boutiques. The buyers would feel more secured to deal with a sourcing firm that has been successful in exporting and running business for long time (Hunt et al., 1967). The small enterprise may be benefited through financial support letter of credit issued by the buyer, and will be able to apply for a bank loan by using that letter. On the other hand, financial support could also be provided by the NGOs in option 1.

7.5 7.7 Implications of the Research and the Conceptual Integrated Supply Chain

7.5.1 Competitive Pricing

The researcher initially studied how international buyers price a product, home market and export prices of the existing craft product exporters. Most firms quote a final price after calculating direct costs and overheads, administration overheads and a profit margin. The price associated with a product has been broken down below to facilitate the study of total cost involved with the proposed supply chain.

Preliminary Costing

After the procurement of the raw material, when a craftsman gets an order, the wage of that craftsman depends on the type and intensity of craft work. However, in that case, the involvement of the middleman adds extra cost, so that needs to be eliminated. In option 1, raw material will be purchased by NGO and artisan will work in the production facility provided by the NGOs. Moreover, NGOs could provide financial support to the artisans. In option 2, raw material will be supplied by the boutiques but artisan will use their own facility for production. The boutiques will co-ordinate and organise the craftsmen, communicate and develop design with sourcing house. However, an operational cost and the profit margins of the boutiques will be added to the cost of final product in this option.

Secondary Costing

From researcher's experience of working in sourcing houses for three years, it has been known that a Bangladeshi sourcing house in industrial apparel sector gets 5-8% commission in general. In addition, an NGO like Aarong calculates a product price based on 4-5% profit for the company. Therefore, for the proposed supply chain, the profit will be shared by the NGOs and sourcing houses

as per the partnership agreement, and sourcing house operational cost would be added to the final cost.

Tertiary Costing

After adding shipping cost and duty fee, the profit margin and operational cost of the buying house will be added. According to interviewee Pablo, his buying house keeps approximately 25-30% profits to calculate the selling price of a product. Finally, the cost associated with running the retail shop will be added to reach the product to the ultimate consumer.

However, the past experience had proved that (Benjamin & Malcolm, 1994) it is beneficial and better strategy to keep the price of a craft product in higher level by maintaining the quality. The reason behind that probably when a customer buys a craft product, they consider it as more of a luxurious artistic product rather than a necessity for everyday life. Therefore, it is better strategy that the suppliers build the capacity to make a good range of diverse product available to choose from.

7.5.2 Lead Time

Haider (Haider, 2007) identified linkage expansion, market or product composition, manufacturing environment as “Deep-level indicators” and product price, lead time, market share and export value as “Surface-level indicators” for measuring competitiveness of Bangladesh apparel industry in international market. Therefore, shortening of lead time can contribute to improve the deep-level indicators and secure a long term stable development of the industry, although it is a slow process. As it was observed and analysed through this research, for being an industry that follows tradition and culture more than recent fashion trend, lead time probably not a crucial issue as it is for the mainstream industrial apparel industry. Moreover, the organisations who are in the export market already maintaining the lead time successfully and there is a huge scope to improve the lead time as well as capacity by training and setting up an effective organisation for the craftsmen.

7.5.3 Product Quality

While measuring the potentiality of being succeeded in export market, the type and quality of a firm’s products would also be considered (Tookey, 1964). Tourists identify the authenticity of a craft product (Littrell, et al., 1992) based on the criteria of its uniqueness, aesthetics, cultural and historical adherence and workmanship. To get the essence of an authentic craft product, several respondents of Littrell’s study identified some requirements of craft products such ‘handmade’ quality, use of high quality raw materials, spending enough time to achieve the quality during production (Littrell, et al., 1992). Similarly, this research found that textile craft buyers are mainly

interested in the visual appearance of craft product. However, the customers of these aesthetics products are expected to be very much conscious about environment.

Bangladeshi craft artisans are eager to cope up with the international product quality requirement as long as it is profitable; technologies and instruments available for them. The supply chain proposed in this thesis can make it easier to maintain and control the quality of the product effectively. The NGO/ATO (In option 1) or the sourcing house (In option 2) working in partnership seems to be the appropriate organisation to supply the raw materials to get a better control over finished products quality. In addition, in-process quality assuring and quality checking of final product, technical assistance and constancy will be provided from that organisation, which will enable better access to the advanced technology and information. That will eventually help the artisan with effective solution, and easy and eco-friendly application of advanced technology.

7.5.4 Preservation of Traditional Designs

The research findings recommend the preservation of the cultural products, as the uniqueness and originality of a craft product is the main asset of a craft product that attracts customers with its handmade appearance and high quality workmanship (Littrell et al., 1992). Moreover, it needs to be made with locally available materials by local craftsmen, and/or sold with the information about the artisan or written documentation of genuineness.

The customer can be motivated to buy a craft product in two ways (Littrell et al., 1992). The outer-directed customers are attracted to the product with the external criteria like appearance and hand feel, whereas some customers look for more in depth information and speciality of the product. For the first group, the important parameters are aesthetics, manufacturing technology and the product design of a previous time or place. Among this group, written evidence at the point of sale makes a big difference on the customer's preference. Similarly, Akonda suggested mentioning the story behind the product on the product label. Whereas, another group of customer is concerned about the time -dimension of the craft product. For a group of customer, an original craft product must have a link to the past in material, technique or content. Therefore, it is very important to have a cultural and historical attachment and handmade quality to market textile craft internationally.

However, smaller changes can increase its acceptability when customer will find it suitable to wear or carry along with other trendy outfit; or value is added to a decorative item by adding some functional application. Simmonds (Simmonds & Smith, 1968) identified that the involvement of a foreign national designers might be suitable to identify products that can easily be sellable to his country.

Proposed supply chain is designed to create a balance composition of adaptation of current trend and preservation of authenticity of a cultural product. In that case, it is recommended that a design team can be created to ensure the balance. The designers, who have expertise in international product designing or a foreign designers working for the sourcing houses, will contribute to give the product a trendy appeal; whereas local designers working for ATO/NGO (in option 1) or for local boutiques (in option 2) will ensure the cultural property of the product design. As the business start to run, customer feedback and data collected directly from the market place about their product will eventually help to analyse, amend and set the optimum and balanced strategy, which is beneficial for their business and definitely for the culture as well.

7.6 Limitations of the Work

Data collection for the research took place over a two months period and exemplars of individuals from the fields were identified for interview. As such, the findings might not be applicable in all situations as the firms did not have equal export capacity and therefore generalisations have not been made from the results collected.

7.7 Future Work

This thesis proposed a basic structure of a supply chain initially. For successful practical application, detailed study in various sourcing and buying situation need to be conducted. Although the research has enabled a proposal for a supply chain to help to market textile crafts of Bangladesh, further study is needed to examine what the issues are. These may be listed as supply chain management, cultural and technical. Questions that could be examined further include:

- How to involve famous international designer to use and promote these traditional designs
- Design development based on Bangladeshi textile craft for international markets
- How international buyers of craft textiles assess the quality of textile craft products.
- What technical and mechanical developments could help to increase the efficiency of handloom, reduce the number of defects of fabric produced, and offer diverse application of each type of the looms.
- Further developments on the dyeing process to produce less waste water and other waste materials, ensure better dyeing quality with better colour fastness.
- What technical and mechanical developments could help to improve the hand spun yarn quality, such as development of process to produce stronger yarn with less defects and various fineness.

- Corporate social responsibility issues such as labour and wages, gender and age are very important elements of consideration in the global supply chain where management and power are areas of great concern from legal, financial and social perspectives.
- Finally, more work is required to investigate how traditional and heritage craft work may be preserved while pursuing international markets.

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GLOSSARY

Part 1 of this glossary contains terms that was used in this thesis (mainly during interviewing people) and have an uncommon and different meaning used by the professionals in Bangladesh in informal conversation. And part 2 contains terms and their meaning as it was used throughout this thesis.

Part 1

Bazar	Local accumulation of shops.
Bohurupi Chumki	Iridescent sequins
Buying house	By the word 'Buying house', locally in Bangladesh, it means 'Sourcing House' or 'Third party agency'.
Chumki	Sequins
Doler	Diamantes
Gamcha	A light weight colourful bath-towel commonly used in Bangladesh.
Gom	Beads
Industry	In some cases, the word 'Industry' locally means 'manufacturing unit' in Bangladesh, as it was used by the interviewees of this research.
Islampur, Nawabpur	One of the biggest accumulation of textile products wholesale shops near capital city of Bangladesh.
Kacchi	One type of hand embroidery stitch.
Kacchipur	One type of hand embroidery stitch.
Kameez	Top wear by young women in Bangladesh.
Kirikiri	Beads
Lagua	One type of hand embroidery stitch.
Lungi	A tubular fabric that men usually wears as a bottom in Bangladesh.

Mahazon	Middleman
Market	Often locally in Bangladesh the word 'Market' refers to the 'geographical cluster of shops'.
Merchandiser	The scope, responsibilities and activities of a merchandiser in textile industry are much broader than in other consumer product companies. Generally in retail industry merchandising refers to the total activities of stock planning, management and control and some companies keep the distribution role along with the merchandising team. The responsibility of a merchandiser at supplier end is different from the role of the same post at retailers end. In Bangladesh, as it meant by the interviewees of this thesis, this positions acts mainly as a communication channel or coordinator between the buyer and the manufacturer.
Nakshi Kantha	Blanket made by hand embroidery.
Pipe	Beads
Poa, Tola, Rotti	Terms usually used for measuring weight of gold or silver in Bangladesh. Tola=Bhori=4 Rotti=11.668 gram.
Saree	A long length of fabric that Bangladeshi ladies usually wears without any stitch.

Part 2

'Craft' and 'Artisan'	Although in certain contexts there are differences between the terms 'artisan' and 'craft' (ie where the term 'artisan' may refer a skilled worker and 'craft' may represent engagement as a hobby (Scrase, 2003), throughout this thesis these words interchangeably used as the meaning is almost indistinguishable in the context that of this thesis, as it was similarly done by Scrase in his writing.
'NGO' and 'ATO'	NGOs may incorporate a branch agency such as an alternative trade organization (ATO) that can generate profits which in turn are reinvested into the social services provided by the NGO or non-profit organization.

Lead Time In textile apparel industry the word 'Lead Time' refers to the time required for raw material purchase and the total manufacturing process till shipment of finished goods.

Appendix 1 Questionnaire for Interviewing Textile Craft Manufacturer

1. What type of craft work you do?
2. How did you get the first contact with the buyer? How do other people get first contact with buyers?
3. Do you have any network or you work individually? How many people are working there?
4. Does the buyer pay you per piece or per hour or day or week basis? What is the rate? Does the payment rate vary according to the product? What parameters are considered during fixing a payment rate?
5. How long does it take to complete a work? What facilities do you require to make the manufacturing time shorter?
6. How do you maintain the quality of your work? What facilities do you require to make the quality better?
7. Where do you get the new ideas and designs from?

Appendix 2 Questionnaire for Interviewing Local Distributor of Textile Crafts

1. Is Bangladesh craft textile ready to export now? What are the limitations in exporting craft textile of Bangladesh?
2. Are you interested to have an established and steady export market?
3. How did you first make contact with the international buyer? How do you communicate with international buyers and manufacturers? Is that a good supply chain or you feel a need for a better supply chain? What do you need from the supply chain that you currently do not get?
4. For exporting, what quality standard you are following? Can you improve? What are the difficulties in improving the quality level?
5. How short lead time can you offer? What are the difficulties? Can you give me a range to approximate time required for various types of fabric (basic fabric to delicate fabric)?
6. Can you reduce the price of your product for the export market? Can you give me a range to approximate cost for various types of fabric (basic fabric to delicate fabric)? What are the difficulties? Do you require any extra pay for the special quality of the design, the lengthy process and intensive labour involvement?

Appendix 3 Questionnaire for Interviewing the Employee of the Sourcing Houses in Bangladesh, and the Buyers in UK

1. Is Bangladesh craft textile ready to export now? What are the limitations in exporting craft textile from Bangladesh?
2. Do the international buyers have interest in sourcing crafted textile of Bangladesh?
3. How can a manufacturer make contact with you for the first time? If a craft textile manufacturer wants to get introduced with an international buyer what they need to do?
4. For exporting craft textiles of Bangladesh what quality standard do you expect to have? What quality level you will allow for these products? Can you tell me with any specific standardisation level?
5. What lead time you can allow for textile crafts considering the lengthy man-made process of crafted textile for various types of fabric (basic fabric to delicate fabric)?
6. How do you calculate the price for a new product? What points do you consider? Will you consider the special design quality, lengthy process and intensive labour involvement in crafted textile production, when you calculate the cost? For the crafted textile what range of price you can consider (basic fabric to delicate fabric)?
7. Do you sell anything currently made out of (in part or entirely) of Bangladeshi craft textiles? Why?

Appendix 4 Questionnaire for Interviewing Textile Craft Retailer

1. From where do you source craft textile for your shop? How do you source?
2. When customers buy a craft textile, do they look for the trend as well, or you can sell those items at any time of the year?
3. Do you sell the craft textile with a price similar to the industrial textile product? Does it vary? If so then how much (range or in percentage)? May I ask for the mark-up of your craft textile products please?
4. Have you ever had a customer complain or refund on a craft textile product for any quality issue? What was that?

Appendix 5 Questionnaire for Interviewing Textile Researcher, Expert and Teacher of Bangladesh

1. What defines craft textiles?
2. To achieve an international market, should Bangladesh craft textile maintain the quality of a handmade production or undertake machine production with the patterns based on various sources that concentrate on profit?
3. Is Bangladesh craft textile ready to export now? What are the limitations in exporting craft textile of Bangladesh?
4. What does the Bangladesh textile industry need to do to build the design profession ready for international market?
5. What does the craft textile industry of Bangladesh need to do to preserve its own national design in international market?
6. When the craft textile is produced for the international market, should we emphasise more on keeping to traditional designs or need to concentrate on serving the buyers demand mainly?

Appendix 6 Transcript of the Interview with Nurzahan

(Here letter 'N' refers dialog of interviewee Nurzahan and 'SA' refers dialog of researcher Shaila Afroj.)

N: aunty, what information you need to know?

SA: What type of work do you do? That is what I need to know.

N: First of all, I do hand embroideries, with swing thread, coloured thread, I do the 'Kacchipur Embroidery'.

SA: okay. What type of work?

N: 'Kacchipur Embroidery'. This is a hand embroidery stitch. Then after embroidering I add sequins ('Chumki') and then diamantes ('doler') and beads ('kirikiri'). For some of those I add 'salma' as per the requirement.

SA: So what are the items in total?

N: 'kirikiri' (beads), 'salma', 'chumki' (sequins), 'doler' (diamond), 'gom' (beads), 'bohurupi chumki' (iridescent sequins), 'pipe' (beads) as per the requirement we add those. If you want to do it, then you can buy as per tola or rotti of sequins, some buy it as per poa (See glossary) It depends on how much you need per colour in a saree.

SA: Do you work mainly on saree?

N: Now I am doing 'Lagua' embroidery. I'm doing in saree as now the trend is mainly saree. I do on kameez (See glossary) as well.

SA: On what else do you work?

N: On Kameez I do 'Kacchi Embroidery', and on saree I do 'Kacchipur Embroidery'.

SA: Do you do block printing?

N: No, I do not do that. People from the factory do that print.

SA: Whom do you work for? From whom do you get the order?

N: A person brings those orders from the factory. From him, I bring 4 or 5 pieces. Give to other people to complete the work and I do it as well. I can't bring a lot.

SA: What factory is that?

N: People bring the job from the factories from Noabjong, Islampur etc.

SA: So, who get orders from those factories?

N: Various ladies bring from the factories.

SA: Do they bring it for some other women as well?

N: She bring it per thousand or per hundred and distribute among various women. Say, I get 5/10 or 7 pieces and distribute among other women and I do as well.

SA: So, how did she know you for the first time? How did she know that you do these types of job?

N: My elder daughter was working in a factory. She used to get order to complete at home. Kalu's wife. From her, we learned the work from her. Now we are doing so.

SA: Then, how did she know you first? How did she know that you do these types of job?

N: There was a woman living nearby who used to get order from 'Aarong'. Kameez. So, we used to get order from her. Then gradually we got introduced with them. Then, we got introduced with 'mahajon' who gets orders from Islampur and Nawabpur. 'Mahajon' brings order from factories, and after completing the job we return it to him.

SA: So, how does 'mahajon' find other person to do the job?

N: They get introduced with one from another. Say, I know ten people who do this type of work. If she gets introduced with me, she can know ten people more. From those ten people, they will know five people more from each person.

SA: Are you involved in any kind of co-operative society or do you work individually?

N: No, no one is involved with any co-operative society. Everybody do it individually.

SA: So, how do they pay you? Do they pay per piece or per hour or per day or per week or...?

N: No. They pay per piece. Per piece may get paid tk. 800 or tk. 900. For 2 or three types of work in a saree we may get tk. 1200 or tk. 1500 depending on the type of work.

SA: So, on which basis the prices vary? When you ask for a price, what do you consider?

N: The people, from whom we get the order, get the profit from transport as well. They will tell us that, for 'kacchipur Embroidery' we will pay tk. 500 and for 'Kacchi Embroidery' tk. 300 or tk. 400. It can be less if the density of embroidery is lower.

SA: The names that you are mentioning, are these names of different embroideries?

N: Yes. They are different types of stitch of hand embroideries. 'Kacchipur' is a certain type of embroidery. The people from factories print on the fabric. We do the embroidery according to that design of the print. So, if the density of embroidery is lower, then the price is lower as well.

SA: Do they consider anything else during fixing the payment rate?

N: Actually, we do not know how much she ('Mahajon') gets per piece. If you need I can provide you the address of that person or some sample if you need so.

SA: That will be great if you can provide me the address. I do not need the sample. So, what is the time limit she fix for you to finish a job?

N: She doesn't fix any time limit to finish a work. I give her back whenever I can finish.

SA: So, there is no fixed time for you to complete a work. Is it?

N: No, she doesn't fix any time for me to finish a job. Just tell to finish as soon as possible.

SA: So, how does she know when you have completed your work and she will come to you to collect the piece?

N: She lives nearby, at 'Bihari Elaka'. Whenever I finish, I go to her place to return it.

SA: So, what do you need to do your work quicker? Do you feel that, if I would get a certain facility, I could do faster.

N: No, there is nothing like that. I can finish faster if I get more people to work with me. Sometimes, when the deadline is very close, if 4/5 of us work together than we can finish soon. And, if 2/1 people work on a piece of work, then it may take 10days, 15 days or sometime even 20days. Usually we get an order to complete within a month.

SA: So, if you involve more people to finish your work, do not you have to pay them as well?

N: Yes, with the blessing of Allah, 4 of us work together. So, we can finish a work within a week.

SA: You mean 4 people from your family. Is it?

N: Yes.

SA: So, except involving more people, what else you need to do your work quicker. Is there any machine or any facility that can help you to do faster?

N: There is nothing like that. We just need to work till late night.

SA: Can you work till late night?

N: Yes we can. Female member at home work at night. Till the electricity is available, until 12 or 1 o'clock at night we work.

SA: So, that is if the electricity is available till that time. So how do you maintain the quality of your work?

N: We do embroidery according to the print on the fabric.

SA: So when you do embroidery according to the print, how do you ensure that it is perfect and neatly done?

N: For that, have to put attention to detail. Even if it takes longer, have to concentrate on work.

SA: Do you feel that, if I would get a certain facility, I could do it perfectly?

N: Yes, I know if I try to be quicker, then I will not be able to maintain the quality. If I get time, then I can do it nicely.

SA: So, where do you get the ideas for new designs?

N: It is already printed on the fabric. I just have to follow it. People from the factory print it.

SA: Do not you need to create some new ideas?

N: Yes. We can make some from our own ideas. 2/1 piece we make sometimes with our own ideas.

SA: So, where do you get those ideas from?

N: I think it by myself. We always do this types of work... try to make something following others. It is not as good as it looks when we get a print on fabric. Or, sometimes it is. We get ideas from what we do and what we see. For an example, somebody do embroidery on 'Nakshi Kantha', so I learn it from her/him, and then if I try it by myself, I can do that. Or sometimes I try to copy from some artist's drawing. May be mine is not as good as his/her one but moderate.

Appendix 7 Transcript of the Interview with Ferdous Chowdhury

(Here letters 'FC' refers dialog of interviewee Ferdous Chowdhury and 'SA' refers dialog of researcher Shaila Afroj.)

SA: Is Bangladesh craft textile ready to export now? What are the limitations in exporting craft textile of Bangladesh?

FC: (Unfortunately, voice recording was not working at the beginning of answering the first question. However, at the end of the interview session, interviewee was requested to repeat the answer, to keep the record)... that within that shipment time, what is the capacity of the supplier. And what is the buyer expecting. It depends on that. But overall we are ready to export.

SA: so what do you think is there any limitations in exporting craft textile of Bangladesh? If so what are those?

FC: limitations means... If I talk about the all types of products generally, knitwear is in the second position in exporting from Bangladesh. Bangladesh is exporting the most, if you consider bed sheet or shirt. In knitwear sector, Bangladesh is doing well. It is possible in knitwear and in industrial textile because they can get the fabric. But the problem is in value addition, and to work on that, I mean embroidery, print or other types of craft work. In that case if you do not have a big artisan group or a big capacity, then it is a problem. So these are the points that the buyer need to understand. It is not like, when you place an order; I put the raw materials on the machine and get 5,000 pieces all together very quickly. It is not possible. May be you can make 1.5 lakhs of t-shirt in a month or 25 days but you can't make 1.5 pieces of kantha within this time. The buyers need to understand that. As I know, whoever the buyer of these types of products, they already know that fact, as they are doing the business. Everything has its own process, so for these products the process is slow as it is a hand production.

SA: Are you interested to have an established and steady export market? ...you or other crafts manufacturers.

FC: As per I know, the producers of these types of products have an association in Bangladesh, called 'Bangla Craft'. Every craft manufacturer in Bangladesh is member of 'Bangla Craft'. There we have some promotional activities. They are arranging fairs, arranging international buyers visit through agencies or through NGOs. So we are interested, we are trying and we want to see the Bangladeshi craft in a good position. As we are interested to export, that's why this association has been established.

SA: How did you first contact with the international buyer? Do you know that?

FC: It is very early, before my joining in this company. In 1986 we started exporting. It was in UK. There is one called 'Trade Craft'. They knew that Bangladesh produces these types of products. So they were our first buyer.

SA: What is the name? Is that 'Trade Craft' you said?

FC: yes. If you search on Google you can find it. This is an UK based company they placed the first export order. So it started long ago and I joined here only one and half year back or around two years back. Now we are working with many others. We are working with many big companies now. Generally craft producer works with the NGOs. For an example we are working with some national NGOs. As we worked with... for their different programs as they liked different types of crafts. Say for any of their program they need 500 or 1000 or 2000 pieces of tapestry or wall-piece or something made with lather, a small amount like this. We produce that small amount for them, as we have a good relation with other NGOs. So there are commercial buyers, and NGOs.

SA: So do you know how the first introduction was made? Did Aarong knock them or they came first?

FC: If you want to know that, then you need to know in depth. Aarong is a type of social enterprise. We are a part of BRAC, which is the largest NGO. They are employing around 65,000 people in Bangladesh. Aarong is part of BRAC. So through BRAC we came to know them. The main supplier of the craft garments, that we are producing, is actually BRAC. Say we are making a nakshi kantha, and BRAC takes the whole responsibility of the production. BRAC has a foundation called 'Ayesha Abed Foundation'. The foundation does the production of craft products. Then they export through Aarong. You must have visited the outlets of Aarong. Then in the outlets at Dhaka, the products reach.

SA: So, how you are communicating with your buyers now?

FC: We have an email ID that is export.aarong and we have our own website, though which we receive queries every day from individual people or big craft product buyers. So who are in the communication department, reply those. There are four sections here. They are: export communication, export production, export commercial and export packaging. So us, who are in export communication, communicating with them, give feedback, send electronic catalogue. They choose the product and meanwhile we negotiate on price, terms and conditions or other aspects. Then they pay and we ship the goods. This is actually our procedure.

SA: The existing supply chain of your company, that you are communicating with the buyers directly, do you think it is a well-established supply chain? Or you think there are some limitations of this current supply chain?

FC: well if you talk about Aarong, we are actually well equipped supplier with good quality service. We can work very precisely. Because of that we are in the export market for 25/26 years. So we are capable.

SA: So you are feeling that the current supply chain has no limitation. Is that right?

FC: limitation is basically... say you have seen a product in the Dhaka show room or visited the website and you knocked on the second date that you want a product of a certain amount, like a saree or a nakshi kantha. In that case you have to understand that we cannot make it immediately. In that case the buyers have to understand. The people who knows Aarong they know that, we do not supply from the products which are currently in production process now. In that case, this communication is a barrier, the idea about Aarong. Otherwise it is okay. May be we face some problem during the first production; it depends in the situation in Bangladesh. Even the climate is a barrier. Say, when the village women are making the nakshi kantha, that area is suffering for flood at that time then production is stopped there. Other than these, I do not feel any other limitation here.

SA: To export, what quality standard you are following?

FC: Well, here India is our competitor. Apart from that, Nepal, Vietnam and China is producing craft products and other third world countries are doing as well. So if we would not produce quality product, we would not have survived. So, I really think we are maintaining a very good quality.

SA: Do you need to maintain any standard? As like ISO standard or anything else.

FC: We will not say it ISO. Not as a quality standard, I want to tell it in a bigger aspect, that we are the member of Fair-trade. As Fair-trade has 10 points and we have to maintain those standards, such as, how working environment of the production area is, is there any child labour involved. We have to maintain 10 standards like these.

SA: Do you consider the facts like colour fastness of fabric or hole or shade variation of fabric?

FC: We maintain some basic points, like we have to provide the Azo-free colour, the dye that will not cause any irritation to skin, need to be BCDC and colour fast. Even the paper products that we make need to be colour fast. If you want to know about those quality standards then it is a big list of standard we have to maintain, different standards for different buyers. For different country it is

different again. For American buyer, you have to maintain even stitch per inch. So we are bound to maintain these entire standards. Especially in customs and in quality we have to maintain standards as per different country's requirement. For an example, a wall frame made of bamboo, you cannot export it if it is not adjusted with UK temperature and if you do not treat the product. As in 30degree temperature in Bangladesh, that small bamboo frame will not get any fungus, but in the UK climate it will get fungus. So, you have to ship that well treated product to the buyer, by maintaining the quality. There are lots of similar quality standards that we have to maintain. Different buyers have different standard, sometimes different entire association have different standards. So, all the standards we need to maintain and we try to maintain.

SA: So, you are saying that, similar to the machine made products, there is a strict standard for these products. It is not very much flexible.

FC: Almost.

SA: Can you improve the quality? For an example, if buyer require products that are more colourfast and will not fade.

FC: There is no limitation of improvement. It is like, even after a shipment, there will be at least few defects. It has some limitations as it is handmade, like flower motifs can be bigger or smaller. So there is surely scope for such improvements.

SA: So, what do you think, is there any barrier for these improvements? Is there anything, for which you cannot improve?

FC: As it is a third world country, there will be surely some limitations. The artisans who are working for us are extremely underprivileged. Say, there is a space of BRAC in a very poor village of a remote area of Jessor. Forty or fifty women are coming there every morning and doing embroidery work on a 'Nakshi Kantha' and producing it there. But everyone cannot understand equally. Say, you have sent the information from Dhaka, that says you have to use the green thread here and gave a certain pantone number. I do not know if you have the idea of pantone number.

SA: Yes I have.

FC: So they need to know this pantone number. If you organise everything, still there is a chance of some variations. So the awareness of the mass people and worker can improve the quality. We actually do not call them worker, we call artisan. They need to be aware. Here we need to work mostly, need to educate them. We are actually working on that. Our mother organisation BRAC has their educational project. They provide the people that education, which is a big co-operation.

SA: So, now the question is about the lead time, which means time after getting an order and till shipment. How short lead time you can offer?

FC: We can do in three months. We work on three months lead time and sometimes before that.

SA: For what quantity?

FC: Actually it depends. Say, for three months... we will see the capacity first... like wheather we have enough artisans to complete the work and how many of them are free at this moment. So usually we ship our consignment in 3 months.

SA: So, if it is a basic or a delicate item, can you do it within 3 months?

FC: Yes.

SA: okay. Do you need anything to make this time shorter?

FC: As I said that we try to deliver before 3 months. We do not have any problem in delivering before that. If we store those in a warehouse then that will add cost, such as for the security we need to pay extra money on that. So, if we can make it ready within this time we deliver it. Generally more than 95% we deliver within deadline. So, till now we didn't have more than 5% case where we could not meet the deadline. Although, as this is not a machine made product, it is made by hand, so you cannot calculate like if a 'nakshi kantha' needs 3 days to complete, you can make 200 kantha in 600 days.

SA: Can the other small boutiques complete within this small period?

FC: I think they will do because in international market buyers will not allow them longer time. Say, after placing an order they will wait for 9 months, that does not happen actually. Otherwise they would not be able to export. Other NGOs or small or medium sized boutiques have some limitations, so I would say that everyone try to maintain this. But may be some do it intentionally, that I do not know about.

SA: So, what is the average price range? Such as, for a basic men's top, what is the export price range?

FC: Well. It depends on the type and density of crafts. I would say, five to seven dollar.

SA: What do you think, is it possible to reduce this price?

FC: It is not possible to reduce more than that. It will require a minimum amount of fabric that will cost minimum 1.40 or 1.50. So around 2 dollar cost is paid here. Then it will need knitting and at least one artisan need to work on it. So, what I said is the minimum price. Other than that, we have some other costs for overhead, textile team, fashion designers.

SA: As a craft product has its special design quality, the process is lengthy, highly labour intensive; do you demand any extra payment? Or you demand the price for the raw materials and process.

FC: Well. We do not ask for any extra payment. But when we fix a price, we consider several points. We have a special team for export. Other than that, where we are working in our local office, has around 400 employees. So, for them, their salary and maintenance, everything we have to calculate. And, around 50 designers are working here. So we need to pay for those, otherwise you cannot survive.

SA: What I am saying is that you must need to pay for the process and material. But, like for a designer product, customers pay more for its uniqueness. Do you do like this? Or considering the lengthy process...?

FC: There is nothing like that. Basically when we do the costing, we want to promote our product. As I said, we receive products in batch. So the price is determined by the artisans. Other than that, what we add is our mark-up. We just add the ... cost in mark-up. Because we do not need to add any big overhead cost to our mark-up. We calculate our duty expense and then calculate the mark-up. So, cost is determined by that woman who is actually producing it. We just add the duty fee and transport etc. But in local retail shop, may be the price is less than it is in export market. Because there is a cost associated with running the outlet. In an outlet around 200 employee works and in a prime location the rent, set-up, utility add a lot of cost. But here we do not have to pay that big amount. We just have to add the expense of our outlet.

SA: So, that is it. And if you do not mind may I ask you the first question again please. If you please do it for me, as my recorder was not working at that moment. The first question was, if Bangladesh crafts textile industry ready to export now. What you said before, just repeat that, I could not actually record that.

FC: Yes we are ready. As we are doing it for a long time, we have the preparation, we have the logistics support. So I would say that we are ready. We are able to export textile craft.

SA: So, it is including all the small boutiques, is everyone one in this industry is ready now?

FC: Well. In that case the small boutiques or NGOs... like they will ship their product but they do not have the logistic support but have got order from buyer. As they have good communication, they got order, in that case then they can ship with us. There are consecutive shipments. We will support each other to do the shipment. If 10 or 15 NGOs or organisations do not work together, they would not be able to compete with a competitive country. If you need to compete with them, then you have to fight a lot. So we do exhibitions, we have some forums, we have Bangla craft, have forum with the sponsorship of WFPO. So we all together we are exporting in limited amount. We are already exporting.

SA: So is there any limitation on exporting craft textile product?

FC: So as I said that we have limitation of communications. As if anyone ask for something within 10 days then it is not possible to make those within 10 days

Appendix 8 Transcript of the Interview with Faridur Reza Sagar

For an example, dealing with customs is a bog haphazard and our transportation system needs improvement.

(Here letters 'FRS' refers dialog of interviewee Faridur Reza Sagar and 'SA' refers dialog of researcher Shaila Afroj.)

Introduction & telling in details about the research work.

SA: Is Bangladesh craft textile ready to export now? What are the limitations in exporting craft textile from Bangladesh?

FRS: Yes, they are exporting already...like Aarong. Is that right? If someone compare with the world export market, then craft is a small percentage. It is there but not in a big volume. Number one reason is that, we do not know properly about the market. Such as...which market, where is the export market, what are the requirements, what is the market standard, up to which standard we need to reach, whom to communicate with. Only 1 or 2 companies, who know about it, are doing business and they do not share with others. And the strength that we have in the craft market, we do not have the scope to explore it with our own initiative. That is why, our craft industry is lagging behind in the world market and there is no significant demand for that. They do not have any idea about our capacity.

SA: So, you are telling that we need to know the market first. Is that what you mean?

FRS: exactly. We need to research on which side of the market we have the strength and specially for which market that product is applicable. When we will be able to click that then automatically we will be able to diversify from one product to another. Same as like, in our garments sector, when we got the order first it was for the trouser only, then we started getting order for jackets, then knitted one. So when they will see that capability for a product initially, then they will automatically find out the prospect as a supplier for other products as well. When they find out the popularity or... then automatically the customers come and interact more. But now here there is no scope for the interaction.

SA: So, you are saying that we first need to be introduced. Is it?

FRS: Exactly

SA: Do the international buyers have interest in sourcing crafted textile of Bangladesh?

FRS: The fact is... the craft is... like I'm saying about C&A...does C&A have a section for the craft? They do not have any section for the craft... but whatever they have...let's see for the craft...what is the amount of craft consumption in the world? What is the percentage of craft apparel consumption comparing to the total apparel consumption? Obviously, I do not think in total it is more than 5-10% than the total apparel consumption. If it is so, then there is a vast market is left for us. Here our competitor is India and China. When India and China is producing craft products for the local consumption, then a market developed there. Then from that, they can export the left over... they are able to find out additional customer for them. Here as, the local consumption is negligible...whatever we have is in very small quantity... that's why we could not explore in that way and like all the customers are not looking for this type of product as they do not have a corner for this type of product... the buyers who have a corner for craft, only those customers need these types of products.

SA: So you are saying that C&A- who is your buyer does not have a section for the crafted products where they need crafted textile?

FRS: They do have but whatever they need can fulfil that demand from China or India.

SA: So they do not knock here for those products. Is it like that?

FRS: No. They do not knock here for those products because they get a wide range of variety products from China in cheap price. They can get it in cheap from Bangladesh, but the variety they will not get here... because that developing skill is not there.

SA: So they never asked for it?

FRS: They never asked for it. But half of the customers, who want these products, can go to companies like Aarong or BRAC...the support that they can provide...other than that no other is actually taking initiative for that. There are some investors individually working but they are very small in company size. Not bigger in size... because you know that we have less development power in comparison to other countries. That is why, though we have a market for it but for the lack of formal support we cannot do it. Cannot grow...

SA: So, you are saying that there is a demand but they are not showing their interest to us. Is it like that?

FRS: Exactly

SA: How can a manufacturer make contact with you for the first time? If a craft textile manufacturer wants to get introduced with an international buyer what do they need to do?

FRS: If anyone has that strength and if we usually buy that product then they come to us with their strength, their product and variety. Then we say that okay show us your strength, we then share it with our buyer that these variety and strength they have... they can provide following support...if you want to buy from them you will get following benefit...

SA: Do they come to the office physically? I mean do they propose through any type of application... how do they know you for the first time and come to you...is there any advertisement or any type of form to fill up that says that following criteria need to be fulfilled or anything like that?... or they come through any recommendation?

FRS: It can be in various way...through media sector or through reference or from company to company ... in different ways...

SA: you mean with the reference from the companies it can be done. Is it? So, let's say...I'm telling that...if crafted textile manufacturers want to get introduced with the international buyers than what should they do?

FRS: Obviously, what I feel, the exporters need to participate more in the trade fairs and exhibitions...say, there is a fair going on in UK or Paris... they need to attend those fairs and have stall on those fairs. Even in the local fairs or exhibitions ... should invite the ambassador of those countries who imports such products. Then they can see what is going on here and understand the business here and can share.

SA: Is there any other way without participating in the fairs? ... to communicate directly with you.

FRS: Can communicate through the company... I mean except fair they can communicate through the trading companies. Then, then can make visits more often to the buyers and have a presentation there.

SA: You mean meeting with the buyers or the buying houses (term locally used for expressing 'sourcing houses')?

FRS: Yes, both are applicable. Yes communicate with both of them ... similar to the sales department of companies arrange the presentation by making appointment, like that...even in some cases can arrange through their embassy... with the support from the embassy they can do it directly through the embassy.

SA: You mean, give them a scope for the presentation through the embassy. Is it?

FRS: To arrange the presentation. Exactly.

SA: For exporting craft textiles of Bangladesh what quality standard do you expect to have? Till what quality level you will allow for these products? Can you tell me with any specific standardisation level?

FRS: They will have to export according to the international market standard.

SA: Up to what quality level you will allow? As there are some limitations, as it is manually made, some quality degradation is natural here. So, because of that will the buyer give any allowance? What is the level of that? Because it is hard for a product made by hand, to reach the same quality level, as a product made by machine has.

FRS: Exactly. It depends subject to subject ... like when you will place an order for a plain product, you will match the criteria like that...but it needs the technical improvement...when you export the garment, whether it is manmade or machine made...but obviously there is a tolerance ... for the international customer there is a certain tolerance for sure, we will look for the visibility first. Okay the physical appearance will be the main concern here rather than a guideline...so in appearance if it looks okay... if what I am accepting is sellable, useable then it is okay. This can vary man to man but there is a standard here that they follow is- how much is that visually acceptable, this will be considered first.

SA: Okay, you said that before testing with the equipment they will judge if it is visually acceptable or not.

FRS: Right.

SA: I mean can you tell a standardisation level that as per your knowledge they usually allow. Or do you know anything about when the buyers buy what quality level they look for.

FRS: As you can say, you made a pullover out of handmade fabric. As it is a handmade product, if it contains holes...say the order is for 100 pieces and you got 10holes... then the issue that it is a handmade product will not work. This item is not sellable. The person who will see the hole will not buy it. So what is required is, we will assess the product visually if it is within the tolerance and how much...

SA: What lead time you can allow for textile crafts considering the lengthy man-made process of crafted textile for various types of fabric (basic fabric to delicate fabric)?

FRS: As it is manually made, though it depends on the quantity... like if the quantity is big than it needs longer lead time. Let's see for minimum 2000/3000 pieces usually it is calculated as 4 months.

SA: Is 4 months for the machine made one?

FRS: Yes, for machine made one. If it is a small quantity than like somehow it is possible even for the crafted one...but if the quantity is big then it actually need to calculate that how much production time it needs then what lead time I will ask for. This time will vary product to product.

SA: you can tell me a range for basic to delicate fabric. If you can give me an idea...

FRS: Like if you buy scarf from me , as it is a plain small item, if you ask for say 2,000 pieces then maybe I can do it within 4/5 months but if you say I need 30,000 pieces than it is not possible, than I need lead time for say 6-8 months may be. So in an average we can say, minimum quantity like 2,00 pieces of craft products...

SA: You mean if it is craft textile they will allow some extra lead time?

FRS: Yes of course. If we get rigid... we will be rigid but it should be justified.... It will not work if we get rigid to a level which is not justified. Isn't it?

SA: How do you calculate the price for a new product? What points do you consider?

FRS: It depends on what raw material used, what type of materials used... how the product is, number 3 is how is the productivity rate, how big manpower you need for that...this type of things we need to do the calculation than we decide the price for a product.

SA: Will you consider the special design quality, lengthy process and intensive labour involvement in crafted textile production, when you calculate the cost? For the crafted textile what range of price you can consider (basic fabric to delicate fabric)?

FRS: Of course. They are not outsider of this field. They are expert. They know what is needed and in what amount... like if I ask for something not reasonable then they will definitely not accept it. Isn't it? We need to find out the reasonable one after calculation then they will accept it... wherever they buy it from, to buy a new product they need to bear that cost, whether from this market or from somewhere else. But they need to pay for it.

SA: So, what is the range they can accept? Any idea...? A range say for a plain product or delicate one... are they willing to pay double or triple or...?

FRS: It is hard to say in this way as it is completely product based, if I can see the product then I can tell. But without having a look at the product I cannot assume a price.

SA: You can tell me a range. What highest price they can pay for a basic or delicate product. Like it will be higher for the delicate product... So how much higher will they pay? What do you think?

FRS: I think, there it varies up to 20%... 20% according to the quantity and the product.

(Below part of this question continued second day →)

SA: So about the price issue. I actually need to know about it more clearly. If I can get a specific idea it would be easier for me to analyse the data. Can you remember that we were talking about the price that upto what price you can pay for the crafted products. So you were telling that, from basic to delicate it will vary approximately 20%... but I mean...how much is that? Because then I need to know first for machine made products how much you are paying than I can know how much will you pay for the crafted one. It would be easier for me, if I could get a clearer idea.

FRS: basically... on which product do you need? ...for an example... if you tell me the name of a product, then...

SA: You can tell about a basic top... and you can assume a quantity. Let's say for 10,000 pieces of an item...

FRS: If it is a men's top... the price that supplier gets... if it is on an average 5 dollar, then for this type... what can be its 20%? 6 dollar approximately...

SA: 5 dollar per piece. Is it?

FRS: no. if it is 5 dollar per piece in a regular price then for those items it will be 6 dollar minimum. If it is a basic item ... It is an initial or tentative price because I cannot tell a price without having a look on that.

SA: Do you sell anything currently made out of (in part or entirely) of Bangladeshi craft textiles? Why? (In first day conversation)

FRS: You have seen the C&A product. Have you seen any? I did not.

SA: Your experience is more than mine. Okay anything related to the craft textile? Which is not exactly totally a handmade product?

FRS: But it is there in home textile products.

SA: What exactly the product was? Specifically, which product you are talking about?

FRS: It was like a 'lungi'. It was actually a bed sheet.

SA: Was that for C&A?

FRS: No, it was for a different customer.

SA: How they become interested to place that order?

FRS: Different looks, different hand feel, more environments friendly that's why for supporting the environment. You know when something made by a machine...the manually made are more environment friendly. They had a campaign. To show it in their campaign, they had some products..

SA: So, do not they have any separate segment for that? It means, that buyer took it as a part only for that. Is it?

FRS: No, they have a separate segment for that. They buy that small quantity all the time just for giving a support to the environment. But they cannot take that in huge amount because no one has the capacity to supply that huge amount. They have a corner, a shelf for this, where they keep this small percentage for all the time.

SA: So, they do it continuously. Is that right?

FRS: Exactly.

(Thanks giving)

Appendix 9 Transcript of the Interview with Nasrullah Khaled Pablo

(Here letters 'NKP' refers dialog of interviewee Nasrullah Khaled Pablo and 'SA' refers dialog of researcher Shaila Afroj.)

Introduction & tell about the research topic and questionnaire.

SA: Is Bangladesh craft textile ready to export now? What are the limitations in exporting craft textile from Bangladesh?

NKP: Definitely they are ready. Yeah. What I think, the main barrier to export from Bangladesh is that we do not have the proper infrastructure for that. For an example, dealing with customs is a bog haphazard and our transportation system needs improvement. Moreover, the government policies need to be more clear and conducive to buyer.

SA: Anything else?

NKP: No. these are the main three points.

SA: Do the international buyers have interest in sourcing crafted textile of Bangladesh?

NKP: Yes. Definitely they are interested. It is a high time of using internet. Huge buyers have approached me to sell these products on Amazon, eBay etc. So, if you can get the right price for that there is a good market demand for those.

SA: How can a manufacturer make contact with you for the first time? If a craft textile manufacturer wants to get introduced with an international buyer what they need to do?

NKP: Through email.

SA: Where do they get the email ID from?

NKP: Where do they get the email ID from? Listen, all of the big companies have their own website. From those websites, suppliers can get their email ID. On the other hand, who does not have their own website... suppliers can get their email Id through friends and other connections or from the export directory.

SA: So, what do you suggest, how the craft manufacturers can be introduced with the international buyers to sell their products?

NKP: If they do not have any contact like this, they should have their own website. They need to contact through their website. And number two way is, they need to have internet connection at

their office. With the help of internet they need to find the buyers of craft products. Then they need to collect the email Id and proceed accordingly.

SA: For exporting craft textiles of Bangladesh what quality standard do you expect to have? Till what quality level you will allow for these products? Can you tell me with any specific standardisation level?

NKP: We follow the M&S standard.

SA: I mean any specific standard like ISO standard or anything like this?

NKP: Nope ISO is like... Shaila... we actually source garments...so we actually do not go for any ISO standard. But usually we maintain the standard of Arcadia or M&S. But the best one is M&S standard.

SA: So, for your products what standard do you maintain?

NKP: We do both of Arcadia and M&S standard. But prefer the M&S standard.

SA: So, if you source craft textile, up to what level of quality would you consider?

NKP: Tolerance level?

SA: Considering the manual manufacturing process, up to what quality level you can consider?

NKP: Yes. When you will compete in the international market $\pm 3\%$ error can be acceptable. European market will not accept more than that. For an example shade variation ... If a craft textile is made, then its shade should be within $\pm 3\%$, weight should be within $\pm 3\%$. The quantity should be within $\pm 5\%$ of the ordered quantity.

SA: So, in an average it should be within 3-5%. Is it?

NKP: Yes, it is.

SA: What lead time you can allow for textile crafts considering the lengthy man-made process of crafted textile for various types of fabric (basic fabric to delicate fabric)?

NKP: Maximum 1 week. If the shipment is delayed more than a week, then we ask for 5-10% discount.

SA: Normally what lead time do you accept?

NKP: You mean from production to shipment? After placing an order, for procurement of raw materials and manufacturing we allow in total 9 weeks. 9 weeks for door to door delivery.

SA: So, if it is 9 months for an industrial mass manufactured textile product, then how long will you extend it for a craft textile product?

NKP: The same. More than 9 weeks? No. Shaila, time is a key point here. Otherwise you have to go for air shipment. An air shipment will cost a lot. So, we cannot afford more than 9 weeks.

SA: Not a delay. At the beginning if the deal if they ask for some extra time considering the process involved in manual production, then for how long extra lead time you will be convinced?

NKP: We can give one week extra time for those products.

SA: How do you calculate the price for a new product? What points do you consider? Will you consider the special design quality, lengthy process and intensive labour involvement in crafted textile production, when you calculate the cost? For the crafted textile what range of price you can consider (basic fabric to delicate fabric)?

First of all, we will see the factory capacity. Then will consider who are their customer and will ask for some sample of that manufacturer. Then we will ask them to supply us the sample of the product that we want to purchase. We confirm the order based on that.

SA: In that way you decide, who will get the order or not. But how do you fix the price of the product?

NKP: The price is... we will tell them the price from our side first. First of all we will collect the product and analyse that if we will get 25-30% profit on it or not. To have 25-30% profit, we make a target price to purchase the product. Within that price we have to purchase a product. I mean we will pay the price for CMT. If a supplier can do within this... if anyone can then you will have the job. Otherwise we will have to look for another supplier. So, after deciding a target price we will ask 5/6 people i.e. our different suppliers if they can do within this.

SA: So, as it is a new product, you will have to get an idea that in what price you will sell your product in the shop.

NKP: The price on which we will sell depends on... as I said, we will consider in what price we can get the product from the supplier i.e. manufacturing cost. With that the shipping cost and duty fee will add. So have to consider the price in total.

SA: So, how do you know the suppliers manufacturing cost?

NKP: We ask for the open cost sheet. May be they will not provide us the actual one. They will change the price a bit which is natural. So, whatever costing we get from them we will calculate 30% profit on that to decide the selling price.

SA: How much do you pay a supplier for industrial textile product of basic to delicate range? And how much will you pay for similar textile craft products? As it have some specific characteristics like special design quality.

NKP: Yes. Shaila, if we buy that product from them, then we will ask for the price they want to sell at. The total cost will be included there. Do you get me? And if we supply the raw material, then we will ask for the production costing.

SA: No, if you do not supply the raw material, can you tell me a range of the price?

NKP: If we buy a product from Bangladesh, we will not pay more than 3/4 USD.

SA: Is that for a textile craft product?

NKP: Yes.

SA: So, how much do you pay for an industrial textile product?

NKP: For a machine made product...say 2.5 to 3 USD. No maximum 2.50 USD.

SA: So you are sourcing machine made textile product at a price of 2.50 USD and you can pay 3/4 USD for textile craft product. Is that so?

NKP: Yes because of the handmade delicate quality, intensive labour involvement and lengthy process.

SA: So till now, have you imported any textile product from Bangladesh?

NKP: No.

SA: Or have you seen any other buyer to source similar product from Bangladesh?

NKP: Not actually a commercial buyer. But one of my friends has brought some craft products.

SA: So, why you company is not interested to source that? Is there any specific reason behind? Any problem you faced?

NKP: No. Actually we didn't source because we sell specially cloths for middle aged women. We source some selective but expensive items, in small quantities.

SA: So why couldn't consider Bangladeshi textile craft for this customer range?

NKP: Because textile craft is specialised product and our customer is a specific group of people in UK. They are not that interested in such product and... do you mean products like necklace and earrings made of beads?

SA: I am considering, the textile products such as handloom products. It could be a top made of jamdani fabric or any other hand woven fabric.

NKS: It needs actually a specialised market. Like if a famous designer would propagate these materials... like if they would present in a catwalk or fashion, then it would be popular. But nobody did so. Therefore there is no proper marketing or advertisement of such product. Another reason is, it is a country where winter is the main season. They prefer manmade fibre for cloths, as in Bangladesh cotton is favourite among people. But in winter, cotton is not that comfortable, they mostly prefer polyester, viscose. But, still I would say that those fabrics can be popular, as jamdani and muslin are very good in quality. Like no one knows about the silk of Bangladesh. It needs good marketing. If anyone could arrange a good show for these... last month I was thinking about importing silk from Bangladesh, as it is very expensive here.

Appendix 10 Transcript of the Interview with Marek Derych

(Here letters 'MD' refers dialog of interviewee Marek Derych and 'SA' refers dialog of researcher Shaila Afroj.)

SA: Where do you source the textile craft for your shop from?

MD: I have no idea. We have... there is a central new products team. They source it from all around the world. And then collect it in a central warehouse and then allocate to various shops. Each Oxfam shop is in a new product category according to how much they will receive that shop. Although there has been small shop is one of the highest categories because of the nature of the area, that it is quite a fluent area, it is quite attractive area, lot of media people, a lot of musician a lot of artists. So there is a good client out for those kinds of products. Some shops in other area get non-new products. They may get some a batch of new Christmas card after Christmas. They will be in the lowest category.

SA: Okay, so when customers buy craft textile, do they look for the trend as well or you can sell those item at any time of the year?

MD: We sell them any time of the year. Again the new product team supply us, we with specific Christmas craft. Thinks for making tree, bubbles, thing for children to make arts for making x-mas trees and things like that. But the majority of craft textiles we sell throughout the year. And we have seasonal batches of things. We do not always get new craft textiles. There is a category called 'make and mend' does include some textiles and swing equipment things like that. So we get a batch of those things twice February and again in April. Just unfortunately the list I have got doesn't differentiate between, in terms of the other products, between the craft textiles and other kind of new products. So I cannot give any more information. But I would have mention that we may probably twice a year get delivery of crafted items.

SA: So the left over items can you sell throughout the year?

MD: Yeah. It is up to each shop manager. After a stock take if things are actually marked down or not to whether we put them on sale or whether we keep the same price in a particular shop then ... yes, I tend not to put things on sale. The only things I tend to put on sale, things specific for Christmas, and things I think very high price like fair trade craft jewellery and we get a batch of that I think in Autumn or in Spring. And so after Christmas I put the jewellery on sale price. But other than that with the craft items I just leave them out. So when we get a new batch of item we look through and can attract like a product which is still new things. And we often with the other items of the last

batch instead of displaying on the shelf we will put them in a basket underneath so that we can look through.

SA: So do you sell the craft textile items with the price similar to the mass manufactured products? Or it does vary?

MD: The price is set again centrally. So the shops... we do not have any choice on price on what price of thinks on sale.

SA: But what you see is there a big difference with mass manufactured products and the craft textile?

MD: Yes, it is more expensive. And you know people what to buy fair trade products.

SA: So can you give me a range or in percentage like how muck expensive usually?

MD: I do not know. Because I do not go any craft shops and I do not buy. I do not look or buy the mass market products. Again you would have to speak to the central office.

SA: Or if you can provide me the marker? If you have that ...

MD: Well again I do not know what the mark-up is I do not know what they buy it for. What happens is that, the items that delivered to the shop, they all go on a category on the till called 'new product'. At the moment there is no way to separate them and see from the till what items being sold, what aren't that has been introduced on all new product items will be barcoded. The only way at the moment is through the stock desk; see how much things are sold. Can you repeat that question? I do not know I was actually...

SA: Yeah. I'm repeating. Do you sell the craft textile items with the price similar to the mass manufactured products? Or it does vary?

MD: And you were saying if I give you an idea of the mark-up..

SA: Yea. Mark up or how much does it differ.

MD: Well see all that we know in the shop it changes for the year so for the whole category of the new product, the gifts includes the bathroom things, body washes and all that kind of thing. We will sell a certain amount a year. Say we sell £20,000 worth. Then each year is different to each year the shop will be credited with the certain percentage of that and it's probably around half. It might go down to forty percent, it might go to sixty percent. To be honest I do not know. I never look.

SA: Like a textile product. Say it is a bag made of textile, I mean fabric which has some crafted design. Maybe hand embroidery, may be some beads people put by hand and there is another one which is made industrially with the machines. So the price difference, like how much is the difference...

MD: I haven't got clue. I have not any type of clues. Say in terms of the mark-up you see... one say in terms of... we do not know much it costs for the new products item to buy. I do not know. I... to be honest, that information is not easily accessible because when they actually decide how much percentage of the money we made in shop on new product, say it is 50% in one year, say it is 55% in another year, that includes all kind of factors, that includes the wages of the people on new product team, includes all that kind of overheads. Like of delivery, the delivery cost might have changed, so you know the actual mark-up, the particular item would be different on each items and specifically in relation to the textile, I haven't got any clue.

SA: No problem. Have you ever had any customer complain or refund on the craft textile product for any quality issue?

MD: No. Nope.

Appendix 11 Transcripts of the Interview with Dr Mahmudul Akonda

(Here letters 'MA' refers dialog of interviewee Mahmudul Akonda and 'SA' refers dialog of researcher Shaila Afroj.)

SA: What defines craft textiles?

MA: Craft textile. I think, this is something related to art and design. Isn't it? Then how can we make something consumable for household products. Something like this. It is nothing related to technical textile. We can say this type of category fall into normal handcrafts or something like this. Normal clothing, make a decorative textile, something like this.

SA: To achieve an international market, should Bangladesh craft textile maintain the quality of a handmade production or undertake machine production with the patterns based on various sources that concentrate on profit?

MA: basically for international marketing, what you need to do actually, you need to search the competitive craft materials in an international market then you have to compete with this Bangladeshi products. And you have to do some survey- these craft available in the market, their quality, the innovative idea or something new. You have to develop some your own materials to complete these existing materials. That is you need to do. You want to enter into international market then those things you have to consider. You have to do the market survey. What I am saying these you have to do some analysis. You have to collect these handicrafts or crafts materials from the market. You have to analyse their design, their customer demand and you have to talk with these seller as well and designer who are working in the area for long time and you have to understand their demand, the market demand, and the customer demand. Then you have to modify the existing materials from Bangladesh to enter the international market. Definitely you have to consider the price and your profit as well. Main thing, you have to get something new and attractive materials, which can beat these existing materials. It is the most important think now because it has to be a fashionable thing. Yes it has to be attractive and fashionable, that is the main thing you have to consider. As you can see lots of craft manufacturers that are making craft materials. Main thing you have to do is, it has to be attractive and acceptable for these consumers and the buyers.

SA: So, what you think, if it requires machine made production for increasing the efficiency of the production, obviously the market will demand as soon as possible to get the product. So, shall we go for machine production or we should carry on the handmade quality?

MA: It depends on what type of craft materials you want to actually develop or you create. It depends on your design. And I have no idea, is there any commercial machine available for these handicrafts types materials? Usually ...

SA: Mainly, like, it will look like the handicraft material, like the pattern will be like the... like jamdani has a specific pattern, so the item will have the jamdani motif but not actually the actual handmade jamdani.

MA: Okay. Yes fine. If it is... it depends on your volume of the production. If you see you need a huge volume, then definitely you need to think about the commercial scale production.

SA: Then maybe it will lose the ethnic appearance of the product as there is a risk. Which one is preferable for Bangladeshi textile market?

MA: No. If you think about the Bangladeshi textile market, I think you should go for handmade types of handicraft because the labour is cheap and yes that is the main thing and there is no modern equipment then you can develop something innovative or something like this. If you think about the handmade style handicraft I think there is a demand for this type of material in the international market. Then it is completely different actually and another thing you have to think instead of synthetic materials you have to go for sustainable materials because its current demand is coming. In the next five or ten years, then everybody is looking for sustainable materials like which is not harmful for the environment. You can develop some those type of material, like sustainable natural fibre based materials which is compostable after their life. That will be a new idea.

SA: So the new item will be with the machine production or handmade?

MA: Handmade will be the best. When you will think about the craft materials everybody thinks it is a handmade product. There is a soft corner for the buyer actually. When they say made by handmade product, they feel some interest to buy those things.

SA: So, we should carry on the handmade production?

MA: Yeah. I think particularly for craft materials we should consider the handmade style and the fashion.

SA: Okay my next question is - Is Bangladesh craft textile ready to export now?

MA: I think so. Last time when I went to Bangladesh I went to Aarong and I really surprised to see these textile craft materials. It has been developed and selling those very nice products which is really... looks very fine and I think if we think there is a big market internationally for those materials

and I was curious, I have been to London, there is a Aarong shop in Bricklane and they are selling these craft materials and importing those materials from Bangladesh and they are selling it here. Definitely there is a huge demand that's why they are surviving to sell these materials here. And definitely I would say there is a big demand for craft materials internationally for those Bangladeshi products.

SA: Say, Aarong we know is the biggest one in Bangladesh, the craft producer. They are the partner of BRAC which is the biggest NGO I think in Bangladesh. So they are getting help from BRAC and they are doing well. But there are lots of other craft producers. You can't develop a industry with only one or two producers or manufacturers. So the total craft industry area, can they stand out from there? Are they ready, the total craft textile industry of Bangladesh?

MA: Yes. I think so. Recently you know there are lots of industries, specially the NGOs, they have different activities to make some craft materials, textile based craft materials and they are providing fund to poor villagers to make those crafts and they are giving fund. They are giving grants, they are giving loans for those purpose. And yes there are lots of industries like NGOs, they are doing those type of activities. And I think they are doing very well actually.

SA: So, can they start now exporting?

MA: They are already exporting. They already started. For last few years they are exporting huge amount of crafts materials in the international market. Then another thing is that, you have to create something innovative from your own idea. You have to make some exceptional materials if you want to go to international market.

SA: Do you know, is there any limitation in exporting craft textile from Bangladesh?

MA: I do not think so because the government is encouraging the entrepreneurs or industries and providing support as well for exporting and to make some export quality goods. And I think it is a good opportunity for Bangladesh that they have lots of resources to make craft materials from textile based ... specially to mention Jamdani and other textile handmade materials. It is really good and really good quality and they are exporting already.

SA: What does the Bangladesh textile industry need to do to build the design profession ready for international market?

MA: Basically if you think about the textile industry in 20 years ago, they were basically based on very poor skilled people. Now lots of skilled people are working in this area. And lots of textile graduates, especially diploma holder people, they are contributing in this area for last ten years. The

textile industry is growing up and changing their dimension in the new area and those people with textile background actually working very hard to develop new types of material or they are contributing the handloom production and Bangladesh government also supporting the handloom industries. I think for design purpose, there is a lack of knowledge and for international market you have to do something new with new design, new concept, it can be different types of design in woven textile or printed one or craft itself. In recent years lots of design institutions, they are also teaching the villagers about new type of crafts. I think Bangladesh needs more skilled people in this area actually.

SA: So what do you think is the lackage? For what purpose they are not able to make a good design profession yet? This design profession is not yet established in Bangladesh. Is that right? So where is the lackage? Why they couldn't... what does they need?

MA: They actually... Bangladesh its major exporting sector is garments sector actually. Everybody is very interested in knitted garments or export items and nobody is interested for craft materials due to may be less profit, less productive and consumable. That's why everybody is taking seriously garments export side. There is a problem that nobody is coming out to develop in this craft sector.

SA: But how many is designing for the machine made industrial one? Is there a lot? Like they are following the buyers design and they are not making any design from Bangladesh. So why are they still lagging behind?

MA: We can say the craft sector is totally different from the garments industry or woven textile industries. That's why as I mentioned earlier, the main industrialist are interested in exporting garments instead of craft materials. That's why this side is not yet developed properly the craft sector. People should consider this sector as a profitable sector. And when they will think this one then export this material internationally, then this sector can be developed otherwise not. Need huge amount of money to develop this sector. As I said they are taking seriously the garments export not the craft export.

SA: But the garment export, are they making design from Bangladesh?

MA: Yeah they are making in... as I know lots of buying house in Bangladesh. They have own designer.

SA: Do they export their own designed goods?

MA: Yeah they do design actually and they make their own garments, using their own design and they send to their buyers and if the buyer approves then they go for the major production. There are

many buying house in Bangladesh and they have their own designer. And the other cases the buyer sends specific design to the garments factory and they make these garments according to the buyers design. In the craft industry may be they can do like this, they can develop crafts using their own design or they can get the buyers design. Suppose if you want to export this craft in Australian market or European market they you have definitely go through buyers or buying house something like this and you have to search this, what type of design required for this market for Australian market or UK market or USA market, they you can get their particular craft design from the buyer then you can duplicate those design and make this craft.

SA: So who are designing the craft textile products that we are selling locally? Like we are making the nakshi kantha, we are making the jamdani and we are selling it within Bangladesh. So there is somebody who is designing these.

MA: Yeah currently in the big industry like Aarong or BRAC started this one. I think they have own designer.

SA: So is that profession established? Like well-known and we can find out specifically this specific role in the organisation and is that profession established properly?

MA: Textile designer or craft designer is totally new actually in Bangladesh. Nobody has paid attention to this sector because this sector was not profitable before. Now when the people think that it is profitable sector for Bangladesh, then they started these things in the last few years. Like big companies like Aarong or BRAC or other company or NGOs they are investing money and they are developing international market for these. But the thing is important, the design for the textile industries or garments or craft industries it matter. The design department is very important. You have to do some design which is acceptable for the buyers and consumers as well. I think in Bangladesh, in Dhaka University there is one department which is called design or something like this. Even design institutes something like this.

SA: So, there are very few?

MA: yeah probably. As I know some graduates from those institutions, they do not know anything about the textile design or craft design but recently there is a huge demand in this sector and they are working in this area. Even they do not know anything about the textile design. And recently they are working; they are feeling there is a big gap, huge demand in this market.

SA: What does the craft textile industry of Bangladesh need to do to preserve its own national design in international market?

MA: It is not always right actually, Bangladesh need to preserve its own national things. Craft is craft. Okay?

SA: Say, when we will sell jamdani, when an European will see a jamdani for the first time, they may think it is an Indian product. So there will be no identity that this is from Bangladesh.

MA: it is right. Yeah.

SA: So the national design is not recognised it is not preserved. May be it will deviate from jamdani to may be like may adopt some other motifs then eventually it will adopt some other material to produce. Then day by day it can deviate and make a different appearance. So to preserve this originality, what we had in our historical culture, what does it need? What should we do?

MA: you have to mention in, we have to mention 'made in Bangladesh' in the label and in international market they are treating Bangladesh as a part of India, whatever you are exporting.

SA: Does the culture look similar?

MA: Yeah. That's why they are treating Bangladesh as a part of India. Most of the people they still think. There is a big confusion actually. We can't do anything about this one. And as we were a part of India a long ago, they are treating as the same. As we have the same culture and everything, quite similar. And in that case, you have to mention in the label of this craft that it is made in Bangladesh like a handmade production and if you want to draw something- like a jamdani or something other than you have to mention that this is made in Bangladesh than customer will say yeah this is not an Indian product.

SA: Only 'made in Bangladesh', like lot of industrial garments produced in Bangladesh which is not designed in Bangladesh. Those are also having the label of 'made in Bangladesh'...

MA: then you can say, in that case I do not know is the craft label is similar to garments label or different from the garments label. In that case you have to mention is source of origin and locally sourced materials and designed by Bangladeshi people and made in Bangladesh something like this. You can say locally sourced material or if you can say sustainable material say 100% sustainable material or eco-friendly materials or you can say Bangladeshi materials.

SA: so anything else to preserve the national design in international market? Anything else we can do? Like during the promotion or like intellectual property right or anything? What you think?

MA: In that case probably you can use Bangladeshi map in the label and something like this. Then people can easily understand that yeah this product came from Bangladesh or you can add Bangladeshi flag so people can understand easily or ...

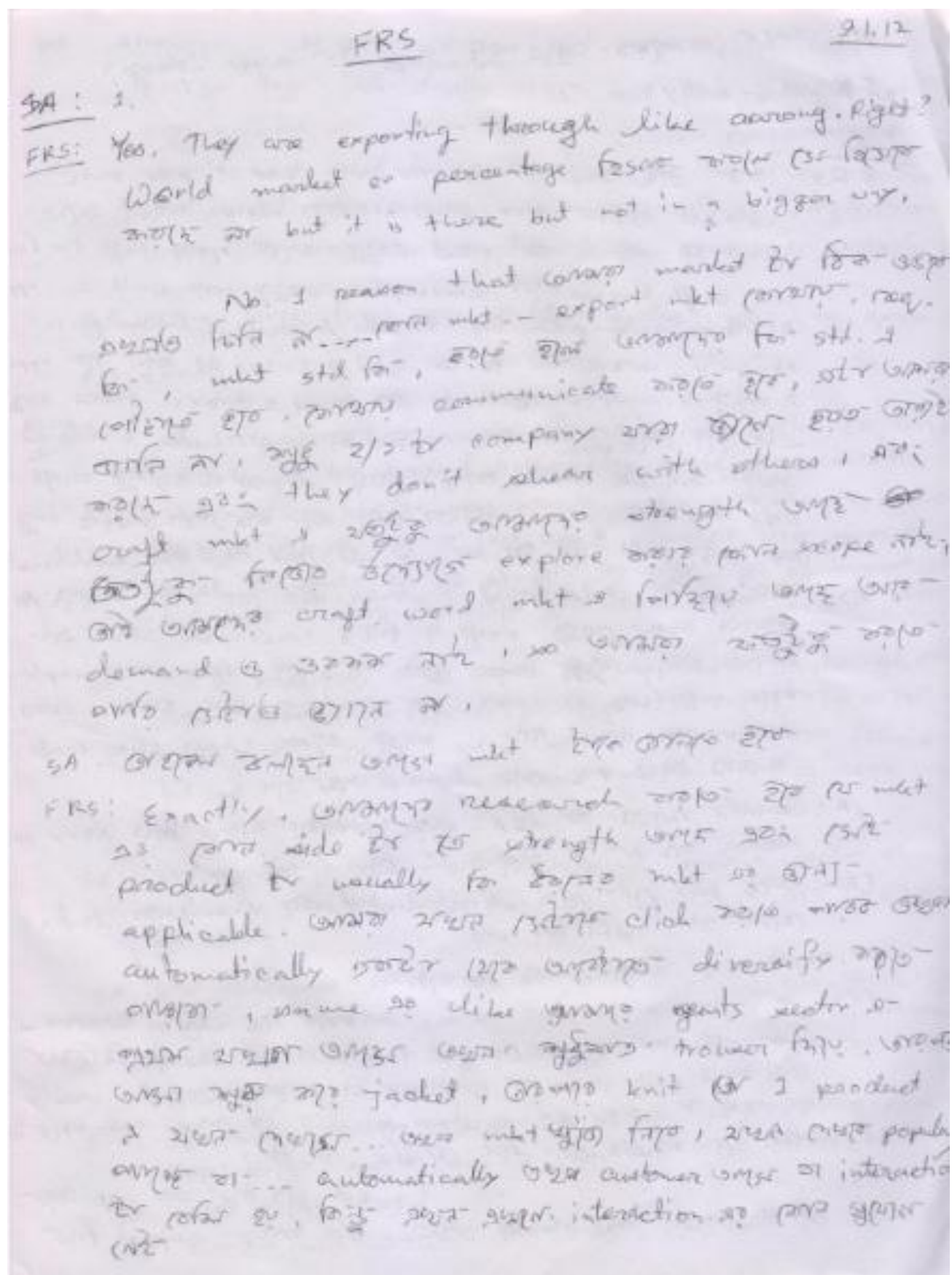
SA: When the craft textile is produced for the international market, should we more emphasise more on keeping to traditional designs or to concentrate on serving the buyers demand?

MA: I think the traditional design will be better. Because there are lots of things we have to consider as a craft materials. Personally when I go to abroad or for holiday then I want to buy something particularly originated from this place there where I go. There is a soft corner that comes automatically from the heart that I want to take something from this culture from this origin. In that case you have to consider the national design in the craft. If it is a craft material that is the important thing I think so.

SA: So there will be a motivation behind buying the product.

MA: Yeah. If you include these local design or local motifs in the craft ...

Appendix 12 Scanned Images of the Bengali Interview Transcripts



SA: ... individually ... but ... not ...
 bigger
 developed
 support

SA:

FRS: Exactly

835

... ..

SA:

FRS:
 reference, through company to company

SA:

FRS: Obviously

SA: sorry

FRS: more fair

last report fair or not the fair is crafts so
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or even the fair & exhibition etc... (the
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SA and the way you find it? (What's the best way to find it?)

more often visit the presentation for more trading companies than also visit the other fair for FRB Company.

SA: are you 2nd? ... 1st buying house stuff for meeting?

FR5: gr. separate both ox[ur]ans

1. $\frac{1}{2}$ of the total weight of the sample is lost in the first stage of the process.
 2. The weight of the sample is reduced by $\frac{1}{4}$ in the second stage.
 3. The weight of the sample is reduced by $\frac{1}{8}$ in the third stage.
 4. The weight of the sample is reduced by $\frac{1}{16}$ in the fourth stage.
 5. The weight of the sample is reduced by $\frac{1}{32}$ in the fifth stage.
 6. The weight of the sample is reduced by $\frac{1}{64}$ in the sixth stage.
 7. The weight of the sample is reduced by $\frac{1}{128}$ in the seventh stage.
 8. The weight of the sample is reduced by $\frac{1}{256}$ in the eighth stage.
 9. The weight of the sample is reduced by $\frac{1}{512}$ in the ninth stage.
 10. The weight of the sample is reduced by $\frac{1}{1024}$ in the tenth stage.
 11. The weight of the sample is reduced by $\frac{1}{2048}$ in the eleventh stage.
 12. The weight of the sample is reduced by $\frac{1}{4096}$ in the twelfth stage.
 13. The weight of the sample is reduced by $\frac{1}{8192}$ in the thirteenth stage.
 14. The weight of the sample is reduced by $\frac{1}{16384}$ in the fourteenth stage.
 15. The weight of the sample is reduced by $\frac{1}{32768}$ in the fifteenth stage.
 16. The weight of the sample is reduced by $\frac{1}{65536}$ in the sixteenth stage.
 17. The weight of the sample is reduced by $\frac{1}{131072}$ in the seventeenth stage.
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 23. The weight of the sample is reduced by $\frac{1}{8388608}$ in the twenty-third stage.
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 26. The weight of the sample is reduced by $\frac{1}{67108864}$ in the twenty-sixth stage.
 27. The weight of the sample is reduced by $\frac{1}{134217728}$ in the twenty-seventh stage.
 28. The weight of the sample is reduced by $\frac{1}{268435456}$ in the twenty-eighth stage.
 29. The weight of the sample is reduced by $\frac{1}{536870912}$ in the twenty-ninth stage.
 30. The weight of the sample is reduced by $\frac{1}{1073741824}$ in the thirtieth stage.
 31. The weight of the sample is reduced by $\frac{1}{2147483648}$ in the thirty-first stage.
 32. The weight of the sample is reduced by $\frac{1}{4294967296}$ in the thirty-second stage.
 33. The weight of the sample is reduced by $\frac{1}{8589934592}$ in the thirty-third stage.
 34. The weight of the sample is reduced by $\frac{1}{17179869184}$ in the thirty-fourth stage.
 35. The weight of the sample is reduced by $\frac{1}{34359738368}$ in the thirty-fifth stage.
 36. The weight of the sample is reduced by $\frac{1}{68719476736}$ in the thirty-sixth stage.
 37. The weight of the sample is reduced by $\frac{1}{137438953472}$ in the thirty-seventh stage.
 38. The weight of the sample is reduced by $\frac{1}{274877906944}$ in the thirty-eighth stage.
 39. The weight of the sample is reduced by $\frac{1}{549755813888}$ in the thirty-ninth stage.
 40. The weight of the sample is reduced by $\frac{1}{1099511627776}$ in the fortieth stage.
 41. The weight of the sample is reduced by $\frac{1}{2199023255552}$ in the forty-first stage.
 42. The weight of the sample is reduced by $\frac{1}{4398046511104}$ in the forty-second stage.
 43. The weight of the sample is reduced by $\frac{1}{8796093022208}$ in the forty-third stage.
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 45. The weight of the sample is reduced by $\frac{1}{35184372088832}$ in the forty-fifth stage.
 46. The weight of the sample is reduced by $\frac{1}{70368744177664}$ in the forty-sixth stage.
 47. The weight of the sample is reduced by $\frac{1}{140737488355328}$ in the forty-seventh stage.
 48. The weight of the sample is reduced by $\frac{1}{281474976710656}$ in the forty-eighth stage.
 49. The weight of the sample is reduced by $\frac{1}{562949953421312}$ in the forty-ninth stage.
 50. The weight of the sample is reduced by $\frac{1}{1125899906842624}$ in the fiftieth stage.
 51. The weight of the sample is reduced by $\frac{1}{2251799813685248}$ in the fifty-first stage.
 52. The weight of the sample is reduced by $\frac{1}{4503599627370496}$ in the fifty-second stage.
 53. The weight of the sample is reduced by $\frac{1}{9007199254740992}$ in the fifty-third stage.
 54. The weight of the sample is reduced by $\frac{1}{18014398509481984}$ in the fifty-fourth stage.
 55. The weight of the sample is reduced by $\frac{1}{36028797018963968}$ in the fifty-fifth stage.
 56. The weight of the sample is reduced by $\frac{1}{72057594037927936}$ in the fifty-sixth stage.
 57. The weight of the sample is reduced by $\frac{1}{144115188075855872}$ in the fifty-seventh stage.
 58. The weight of the sample is reduced by $\frac{1}{288230376151711744}$ in the fifty-eighth stage.
 59. The weight of the sample is reduced by $\frac{1}{576460752303423488}$ in the fifty-ninth stage.
 60. The weight of the sample is reduced by $\frac{1}{1152921504606846976}$ in the sixtieth stage.
 61. The weight of the sample is reduced by $\frac{1}{2305843009213693952}$ in the sixty-first stage.
 62. The weight of the sample is reduced by $\frac{1}{4611686018427387904}$ in the sixty-second stage.
 63. The weight of the sample is reduced by $\frac{1}{9223372036854775808}$ in the sixty-third stage.
 64. The weight of the sample is reduced by $\frac{1}{18446744073709551616}$ in the sixty-fourth stage.
 65. The weight of the sample is reduced by $\frac{1}{36893488147419103232}$ in the sixty-fifth stage.
 66. The weight of the sample is reduced by $\frac{1}{73786976294838206464}$ in the sixty-sixth stage.
 67. The weight of the sample is reduced by $\frac{1}{147573952589676412928}$ in the sixty-seventh stage.
 68. The weight of the sample is reduced by $\frac{1}{295147905179352825856}$ in the sixty-eighth stage.
 69. The weight of the sample is reduced by $\frac{1}{590295810358705651712}$ in the sixty-ninth stage.
 70. The weight of the sample is reduced by $\frac{1}{1180591620717411303424}$ in the seventieth stage.
 71. The weight of the sample is reduced by $\frac{1}{2361183241434822606848}$ in the seventy-first stage.
 72. The weight of the sample is reduced by $\frac{1}{4722366482869645213696}$ in the seventy-second stage.
 73. The weight of the sample is reduced by $\frac{1}{9444732965739290427392}$ in the seventy-third stage.
 74. The weight of the sample is reduced by $\frac{1}{18889465931478580854784}$ in the seventy-fourth stage.
 75. The weight of the sample is reduced by $\frac{1}{37778931862957161709568}$ in the seventy-fifth stage.
 76. The weight of the sample is reduced by $\frac{1}{75557863725914323419136}$ in the seventy-sixth stage.
 77. The weight of the sample is reduced by $\frac{1}{151115727451828646838272}$ in the seventy-seventh stage.
 78. The weight of the sample is reduced by $\frac{1}{302231454903657293676544}$ in the seventy-eighth stage.
 79. The weight of the sample is reduced by $\frac{1}{604462909807314587353088}$ in the seventy-ninth stage.
 80. The weight of the sample is reduced by $\frac{1}{1208925819614629174706176}$ in the eightieth stage.
 81. The weight of the sample is reduced by $\frac{1}{2417851639229258349412352}$ in the eighty-first stage.
 82. The weight of the sample is reduced by $\frac{1}{4835703278458516698824704}$ in the eighty-second stage.
 83. The weight of the sample is reduced by $\frac{1}{9671406556917033397649408}$ in the eighty-third stage.
 84. The weight of the sample is reduced by $\frac{1}{19342813113834066795298816}$ in the eighty-fourth stage.
 85. The weight of the sample is reduced by $\frac{1}{38685626227668133590597632}$ in the eighty-fifth stage.
 86. The weight of the sample is reduced by $\frac{1}{77371252455336267181195264}$ in the eighty-sixth stage.
 87. The weight of the sample is reduced by $\frac{1}{154742504910672534362390528}$ in the eighty-seventh stage.
 88. The weight of the sample is reduced by $\frac{1}{309485009821345068724781056}$ in the eighty-eighth stage.
 89. The weight of the sample is reduced by $\frac{1}{618$

FRS: remember to communicate the goals... sales presentation to the target appointment fix even in some cases ~~the~~ and encourage analysis of the market... support for the business plan

SA and other major cities of presentation co-
? how are you?

ERS: presentation of vector \vec{v} (vib), exactly

25. 30,000 units. Order for 30,000 units, (1/1/15)
 order lead time 8-10 weeks (1/1/15)
 26. 20,000 units. Order for 20,000 units, (1/1/15)
 order lead time 8-10 weeks (1/1/15)
 27. 10,000 units. Order for 10,000 units, (1/1/15)
 order lead time 8-10 weeks (1/1/15)
 28. 5,000 units. Order for 5,000 units, (1/1/15)
 order lead time 8-10 weeks (1/1/15)
 29. 2,500 units. Order for 2,500 units, (1/1/15)
 order lead time 8-10 weeks (1/1/15)
 30. 1,250 units. Order for 1,250 units, (1/1/15)
 order lead time 8-10 weeks (1/1/15)
 31. 625 units. Order for 625 units, (1/1/15)
 order lead time 8-10 weeks (1/1/15)
 32. 312.5 units. Order for 312.5 units, (1/1/15)
 order lead time 8-10 weeks (1/1/15)
 33. 156.25 units. Order for 156.25 units, (1/1/15)
 order lead time 8-10 weeks (1/1/15)
 34. 78.125 units. Order for 78.125 units, (1/1/15)
 order lead time 8-10 weeks (1/1/15)
 35. 39.0625 units. Order for 39.0625 units, (1/1/15)
 order lead time 8-10 weeks (1/1/15)
 36. 19.53125 units. Order for 19.53125 units, (1/1/15)
 order lead time 8-10 weeks (1/1/15)
 37. 9.765625 units. Order for 9.765625 units, (1/1/15)
 order lead time 8-10 weeks (1/1/15)
 38. 4.8828125 units. Order for 4.8828125 units, (1/1/15)
 order lead time 8-10 weeks (1/1/15)
 39. 2.44140625 units. Order for 2.44140625 units, (1/1/15)
 order lead time 8-10 weeks (1/1/15)
 40. 1.220703125 units. Order for 1.220703125 units, (1/1/15)
 order lead time 8-10 weeks (1/1/15)
 41. 0.6103515625 units. Order for 0.6103515625 units, (1/1/15)
 order lead time 8-10 weeks (1/1/15)
 42. 0.30517578125 units. Order for 0.30517578125 units, (1/1/15)
 order lead time 8-10 weeks (1/1/15)
 43. 0.152587890625 units. Order for 0.152587890625 units, (1/1/15)
 order lead time 8-10 weeks (1/1/15)
 44. 0.0762939453125 units. Order for 0.0762939453125 units, (1/1/15)
 order lead time 8-10 weeks (1/1/15)
 45. 0.03814697265625 units. Order for 0.03814697265625 units, (1/1/15)
 order lead time 8-10 weeks (1/1/15)
 46. 0.019073486328125 units. Order for 0.019073486328125 units, (1/1/15)
 order lead time 8-10 weeks (1/1/15)
 47. 0.0095367431640625 units. Order for 0.0095367431640625 units, (1/1/15)
 order lead time 8-10 weeks (1/1/15)
 48. 0.00476837158203125 units. Order for 0.00476837158203125 units, (1/1/15)
 order lead time 8-10 weeks (1/1/15)
 49. 0.002384185791015625 units. Order for 0.002384185791015625 units, (1/1/15)
 order lead time 8-10 weeks (1/1/15)
 50. 0.0011920928955078125 units. Order for 0.0011920928955078125 units, (1/1/15)
 order lead time 8-10 weeks (1/1/15)
 51. 0.00059604644775390625 units. Order for 0.00059604644775390625 units, (1/1/15)
 order lead time 8-10 weeks (1/1/15)
 52. 0.000298023223876953125 units. Order for 0.000298023223876953125 units, (1/1/15)
 order lead time 8-10 weeks (1/1/15)
 53. 0.0001490116119384765625 units. Order for 0.0001490116119384765625 units, (1/1/15)
 order lead time 8-10 weeks (1/1/15)
 54. 7.5e-05 units. Order for 7.5e-05 units, (1/1/15)
 order lead time 8-10 weeks (1/1/15)
 55. 3.75e-05 units. Order for 3.75e-05 units, (1/1/15)
 order lead time 8-10 weeks (1/1/15)
 56. 1.875e-05 units. Order for 1.875e-05 units, (1/1/15)
 order lead time 8-10 weeks (1/1/15)
 57. 9.375e-06 units. Order for 9.375e-06 units, (1/1/15)
 order lead time 8-10 weeks (1/1/15)
 58. 4.6875e-06 units. Order for 4.6875e-06 units, (1/1/15)
 order lead time 8-10 weeks (1/1/15)
 59. 2.34375e-06 units. Order for 2.34375e-06 units, (1/1/15)
 order lead time 8-10 weeks (1/1/15)
 60. 1.171875e-06 units. Order for 1.171875e-06 units, (1/1/15)
 order lead time 8-10 weeks (1/1/15)
 61. 5.859375e-07 units. Order for 5.859375e-07 units, (1/1/15)
 order lead time 8-10 weeks (1/1/15)
 62. 2.9296875e-07 units. Order for 2.9296875e-07 units, (1/1/15)
 order lead time 8-10 weeks (1/1/15)
 63. 1.46484375e-07 units. Order for 1.46484375e-07 units, (1/1/15)
 order lead time 8-10 weeks (1/1/15)
 64. 7.32421875e-08 units. Order for 7.32421875e-08 units, (1/1/15)
 order lead time 8-10 weeks (1/1/15)
 65. 3.662109375e-08 units. Order for 3.662109375e-08 units, (1/1/15)
 order lead time 8-10 weeks (1/1/15)
 66. 1.8310546875e-08 units. Order for 1.8310546875e-08 units, (1/1/15)
 order lead time 8-10 weeks (1/1/15)
 67. 9.1552734375e-09 units. Order for 9.1552734375e-09 units, (1/1/15)
 order lead time 8-10 weeks (1/1/15)
 68. 4.57763671875e-09 units. Order for 4.57763671875e-09 units, (1/1/15)
 order lead time 8-10 weeks (1/1/15)
 69. 2.288818359375e-09 units. Order for 2.288818359375e-09 units, (1/1/15)
 order lead time 8-10 weeks (1/1/15)
 70. 1.1444091796875e-09 units. Order for 1.1444091796875e-09 units, (1/1/15)
 order lead time 8-10 weeks (1/1/15)
 71. 5.7220458984375e-10 units. Order for 5.7220458984375e-10 units, (1/1/15)
 order lead time 8-10 weeks (1/1/15)
 72. 2.86102294921875e-10 units. Order for 2.86102294921875e-10 units, (1/1/15)
 order lead time 8-10 weeks (1/1/15)
 73. 1.430511474609375e-10 units. Order for 1.430511474609375e-10 units, (1/1/15)
 order lead time 8-10 weeks (1/1/15)
 74. 7.152557373046875e-11 units. Order for 7.152557373046875e-11 units, (1/1/15)
 order lead time 8-10 weeks (1/1/15)
 75. 3.5762786865234375e-11 units. Order for 3.5762786865234375e-11 units, (1/1/15)
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 76. 1.78813934326171875e-11 units. Order for 1.78813934326171875e-11 units, (1/1/15)
 order lead time 8-10 weeks (1/1/15)
 77. 8.94069671630859375e-12 units. Order for 8.94069671630859375e-12 units, (1/1/15)
 order lead time 8-10 weeks (1/1/15)
 78. 4.470348358154296875e-12 units. Order for 4.470348358154296875e-12 units, (1/1/15)
 order lead time 8-10 weeks (1/1/15)
 79. 2.2351741790771484375e-12 units. Order for 2.2351741790771484375e-12 units, (1/1/15)
 order lead time 8-10 weeks (1/1/15)
 80. 1.11758708953857421875e-12 units. Order for 1.11758708953857421875e-12 units, (1/1/15)
 order lead time 8-10 weeks (1/1/15)
 81. 5.58793544769287109375e-13 units. Order for 5.58793544769287109375e-13 units, (1/1/15)
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 82. 2.793967723846435546875e-13 units. Order for 2.793967723846435546875e-13 units, (1/1/15)
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 83. 1.3969838619232177734375e-13 units. Order for 1.3969838619232177734375e-13 units, (1/1/15)
 order lead time 8-10 weeks (1/1/15)
 84. 6.9849193096160888671875e-14 units. Order for 6.9849193096160888671875e-14 units, (1/1/15)
 order lead time 8-10 weeks (1/1/15)
 85. 3.49245965480804443359375e-14 units. Order for 3.49245965480804443359375e-14 units, (1/1/15)
 order lead time 8-10 weeks (1/1/15)
 86. 1.746229827404022216796875e-14 units. Order for 1.746229827404022216796875e-14 units, (1/1/15)
 order lead time 8-10 weeks (1/1/15)
 87. 8.731149137020111083984375e-15 units. Order for 8.731149137020111083984375e-15 units, (1/1/15)
 order lead time 8-10 weeks (1/1/15)
 88. 4.3655745685100555419921875e-15 units. Order for 4.3655745685100555419921875e-15 units, (1/1/15)
 order lead time 8-10 weeks (1/1/15)
 89. 2.18278728425502777099609375e-15 units. Order for 2.18278728425502777099609375e-15 units, (1/1/15)
 order lead time 8-10 weeks (1/1/15)
 90. 1.091393642127513885498046875e-15 units. Order for 1.091393642127513885498046875e-15 units, (1/1/15)
 order lead time 8-10 weeks (1/1/15)
 91. 5.4569682106375694274940234375e-16 units. Order for 5.4569682106375694274940234375e-16 units, (1/1/15)
 order lead time 8-10 weeks (1/1/15)
 92. 2.72848410531878471374701171875e-16 units. Order for 2.72848410531878471374701171875e-16 units, (1/1/15)
 order lead time 8-10 weeks (1/1/15)
 93. 1.364242052659392356873505859375e-16 units. Order for 1.364242052659392356873505859375e-16 units, (1/1/15)
 order lead time 8-10 weeks (1/1/15)
 94. 6.821210263296961784367529296875e-17 units. Order for 6.821210263296961784367529296875e-17 units, (1/1/15)
 order lead time 8-10 weeks (1/1/15)
 95. 3.4106051316484808921837646484375e-17 units. Order for 3.4106051316484808921837646484375e-17 units, (1/1/15)
 order lead time 8-10 weeks (1/1/15)
 96. 1.70530256582424044609188232421875e-17 units. Order for 1.70530256582424044609188232421875e-17 units, (1/1/15)
 order lead time 8-10 weeks (1/1/15)
 97. 8.52651282912120223045941162109375e-18 units. Order for 8.52651282912120223045941162109375e-18 units, (1/1/15)
 order lead time 8-10 weeks (1/1/15)
 98. 4.263256414560601115229705810546875e-18 units. Order for 4.263256414560601115229705810546875e-18 units, (1/1/15)
 order lead time 8-10 weeks (1/1/15)
 99. 2.1316282072803005576148529052734375e-18 units. Order for 2.1316282072803005576148529052734375e-18 units, (1/1/15)
 order lead time 8-10 weeks (1/1/15)
 100. 1.06581410364015027880742645263671875e-18 units. Order for 1.06581410364015027880742645263671875e-18 units, (1/1/15)
 order lead time 8-10 weeks (1/1/15)

~~Nagru~~
Nagruallah Khaleel Pablo

17.1.10 - Afternoon - 15 min 15 sec.

Introduction & tell about the research & the questionnaire.

Ques 1

NKP: definitely they are ready. Yeah, Bangladesh (the) country is
main limitation for the order and the order - or maybe
infrastructure for the order and the order no 1 customs is order
& the order - the order (the) transportation and road
transport and the order better and the order is policy and
clear so: conducive to buyer and the order

SA: what is the order?

NKP: it is the order - main

Ques 2 the definitely interested. The order for the internal 2.35, 2.35

The Amazon, they is the order for the order buyer has
approached me. The order? So if you can get the right price and
the market order

SA: the order the manufacturer contact and the order is the order
the order the order

NKP: through email

SA: the email id for the order

NKP: email id for the order and the order - or the order
the order for the order (the) company is the company (the) order
website and the website is the order and the order and
website of the order (the) order (the) order through friendly
connection or the order export directly. 5. 10. 10. 10. 10.

SA: the order to suggest the order (the) order and the order and
factory and the order internationally the order product will be the order
the order and the order introduced the order?

NKP:

NKP: They are aware that companies or not they should have their own website, website as another they advertise about this, know 2 more than... which... more they office a internet about this is office a internet as another they office as another as craft buyer... which... they email addresses from they other management they will have to process accordingly.

SA: They are aware of crafted textile import and export for std. countries export and.

NKP: M&S standard.

SA: They are ISO level and... .

NKP: It ISO level is - Shila - which for their goods and for ISO level which company prefer another company but usually which is a standard for the for which Archidia is - M&S but the best one is M&S standard for their archidia for craft export and they are better they are best and if you can.

SA: It is another product as they are aware another they are for.

NKP: Which M&S, Archidia they are aware for ISO, prefer their M&S.

SA: With craft import and export they are aware for level and... from.

NKP: Tolerance level?

SA: They are for their handmade process as they are aware or consider it?

NKP: They are aware for their handmade process as they are aware $\pm 3\%$ error acceptable, as European mkt a as for the taller and as 1 para they are variation, they are craft for another for as shed as approve and $\pm 3\%$ of this, weight $\pm 3\%$ and as quantity order and as 5). as they are quantity.

SA: And in an avg. 3-5% and.

NKP: Yes yes 3-5

Q1: In order to confirm 25-30% profit margin, we need to know the price of the product. If the price is too high, we will have to look for a different supplier. If the price is too low, we will have to look for a different supplier. If the price is just right, we will have to look for a different supplier.

Telephone interview

1pm - 2pm
the time

Address: House no. - 5/5,
Road no. - 4,
12B Pallabi, Dhaka

[illegible]

(The following is a list of some of the most common types of errors that are made in the use of the English language.)

- One of the most common errors is the use of the wrong tense of the verb.
- Another common error is the use of the wrong form of the verb.
- A third common error is the use of the wrong preposition.
- A fourth common error is the use of the wrong pronoun.
- A fifth common error is the use of the wrong conjunction.
- A sixth common error is the use of the wrong article.
- A seventh common error is the use of the wrong adjective.
- An eighth common error is the use of the wrong adverb.
- A ninth common error is the use of the wrong noun.
- A tenth common error is the use of the wrong pronoun.

Appendix 13 Promotional Literatures of Aarong

AARONG – THE BRAND STORY

The Beginning

Aarong started with a clear ‘Purpose’, a purpose that emanated from BRAC’s core vision of alleviating poverty and empowering people towards a better future. BRAC started its operations soon after the liberation war, on resettling and rehabilitating refugees returning from India. Later, in 1976, BRAC began training women in sericulture in Manikganj and Ayesha Abed, who worked at BRAC, initiated many of the major activities of Aarong by identifying and experimenting with various crafts that women could produce at home. At that time there were only a few buyers who were scattered across Dhaka. Weeks, even months, would pass before the women would get their payment. The idea of Aarong was born out of a need to ensure that the women silk rearers, embroiderers and block printers of Manikganj were paid for their goods upfront, so that they could feed their families. When BRAC decided to open its own retail outlet under the brand name Aarong, meaning ‘village fair’, it broadened its arms to include other artisans and master craftsmen throughout Bangladesh who were involved in the making of handicrafts for generations, and were finding it extremely difficult to survive in the newly formed country. Bangladesh has a long history of folk art and crafts but in general art and crafts were infrequently marketed as a meaningful enterprise for the poor. In the 1970s, BRAC was examining any and all possibilities for alternative forms of productive livelihood, especially for women, and the proper commercialization of art and crafts turned out to be a promising option. The first Aarong outlet opened its doors in December 1978 with jamdani and block printed silk sarees, nakshi kantha quilts, jute products, clay pottery, silver jewellery, leather goods and many other beautiful handmade products.

The Evolution

In the late 1970s and early 1980s Aarong focused on developing its product lines and production capabilities. Aarong’s designers began to study and catalogue the designs and motifs of traditional art forms, visiting museums, elderly craft masters and private collectors. They experimented with indigenous materials and forms, adapting them to possible new lines. Aarong hired master craftsmen to help train village women and created a Textile Design and Service Workshop in Manikganj to experiment with materials and technologies in stitching, weaving and dying.

In 1982, the Ayesha Abed Foundation (“AAF”) was established by family and friends to commemorate the memory and work of late Ayesha Abed who died unexpectedly during childbirth in 1981. The Foundation was created to provide an appropriate working environment, financial and technical assistance and training to develop rural women’s skills in various crafts. Aarong would buy all of the products produced by women under AAF.

During the 1980s, in addition to starting the AAF, Aarong opened more retail outlets and began exporting a small percentage of goods to fair trade organizations in Europe. By the mid to late 1980s Aarong began to emerge as a fashion brand due to its innovative designs and high quality products despite the fact that the majority of urban Bangladeshis had little fashion awareness and consciousness.

Aarong was the first brand to start doing photo shoots and hold fashion shows, well researched craft exhibitions and other forms of media publicity focused events. Through these groundbreaking marketing initiatives Aarong was able to grow its popularity and brand awareness within the country.

By the early 1990s Aarong had become the leading fashion house in Bangladesh and had created a one-stop, destination location for middle to upper class urban shoppers. During the 1990s, Aarong continued to build brand equity through fashion shows and publicity events while benefiting from the emerging prominence of fashion in Bangladeshi society. At the same time, Aarong’s unique product designs were able to bring consumer attention back to the crafts that are indigenous to Bangladesh as its designers blended the traditional with the contemporary in a way that was able to win consumer appeal and start a revolution in trends that has now been taken up by countless other boutiques and brands.

Aarong Today

Today, Aarong has grown into a thriving enterprise showcasing ethnic wear to beautiful crafts from hand-woven silks, cotton, endi to terracotta, bamboo, jute, brass, leather and much more. From a small initiative to protect the interest of a rural community, Aarong has grown into one of Bangladesh's biggest retail chains, with nine stores spread across the major metropolitan areas of the country - in Dhaka, Chittagong, Sylhet and Khulna and one franchise in London, UK. The brand’s reach has spread throughout the country as it operates 13 AAF centers (with nearly 600 sub-centers) and works with over a 1000 artisan groups and entrepreneurs while ensuring the livelihood of over 65,000 artisans and their families, thus directly benefiting 320,000 people. In addition, through the

profits it generates and redistributes through BRAC's development programs, Aarong benefits hundreds of thousands more people as well as provides a service to consumers.

The brand generates a strong emotional connection and loyalty while bringing people together to showcase the best that Bangladesh's highly skilled artisans have to offer. In addition to Aarong's strong brand awareness and presence as the leading fashion house in Bangladesh, a key point of differentiation is the department store level product range and destination location status. Aarong is a one-stop shopping location from clothing to household items, gifts and fashion accessories to children's toys. Aarong outlets have unique and convenient features such as parking areas and in-store cafes to round out the shopping experience.

Aarong's customers are not only the urban and middle to upper class Bangladeshis and expatriates but also include Bangladeshis living abroad who are looking for products that connect them to their country and roots and represent their identity as a Bangladeshi. Customers also include foreigners visiting Bangladesh, as Aarong is a must visit destination that has a prominent mention in The Lonely Planet guide to Bangladesh. It is a place to pick up a piece of Bangladesh with a souvenir to remind visitors of the culture, vibrancy and warmth of the people and the country.

The unique positioning of Aarong as a 'Bangladeshi Brand of Pride' is built on its visionary and pioneering role in preserving, promoting and popularizing Bangladeshi crafts and the values of innovation, integrity, empathy and continuous learning that drive the brand to this day.

Appendix 14 Standard Email Sent to the Interviewees

Calendar

Contacts

Deleted Items

Drafts [5]

Inbox (47)

Junk E-Mail

Sent Items

Click to view all folders

Manage Folders...

Shaila Afroj U1074849

Sent: 16 November 2011 20:07

To: export.aarong@brac.net

Cc: marketing.aarong@brac.net

Dear Sir / Madam

I am a textile graduate and have worked with a global brand for almost three years. Currently I am undertaking an MA by Research titled "Investigation into how global fashion trends can be incorporated with Bangladeshi local textile design" at University of Huddersfield, UK. The main objective of this research is to investigate the opportunities for Bangladeshi crafted textile in global markets, study existing industrial apparel sourcing offices that are working with leading global brands and retailer; and identify possible links between the craft sector and global retailers to export the local crafted textile to the world market.

Bangladeshi local handmade textile has a glorious history of 2,000 years. Artisans currently involved directly or indirectly, in this industry in part time or full time basis face severe competition but, after the liberation of Bangladesh, a number of boutiques came in front in the form of local brand. Some of them have started exporting in small scale or getting internationally well known by attending the international trade fairs. The global current trend is that the international customers are getting interested in eco-friendly products and in that context hand-loom textiles could be the best option. Against a backdrop of global recession in world market, customers are looking toward sustainable products - handmade products could be attractive with its elegant old and worn look and feel. Therefore, the asset of rich heritage and culture is there, and the world market is also ready to receive for its own interest. my research is trying to identify link between the local Bangladeshi local craft manufacturers and the global brands and retailers the things.

In the interest of this research work, with your kind permission and co-operation, I need to study on the organisational structure, working process, history for introducing product to the international market of your firm. I will send you the questionnaire before the interviewing, for your kind acknowledgement.

It would be grateful, if you could provide me the information that I require to carry out my research . I'll acknowledge your contribution in the research report. However, if I need to submit an official letter from the University to get the permission for conducting the research, I'll be happy to provide that.

Looking forward to hear from you very soon.

Best regards

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