ABRIDGED FINAL REPORT

Baseline Research Study

for Developing Artisanal Livelihoods in Rural Pakistan (Project RANG) in Ten Districts of Sindh and South Punjab

for the

Indus Heritage Trust, Pakistan

Shadab Fariduddin

01-Oct-15

FCG Human Capital (Pvt.) Ltd.

It is an abridged version of the detailed final report. This document presents the essential findings of the baseline research carried out for the RANG project of the Indus Heritage Trust (IHT). The baseline was conducted in five districts each of Sindh and South Punjab. It focused on mapping current socio-economic profile of vulnerable textile artisans in these districts. The findings are meant to inform the design of the project impact measurement parameters and the programmatic interventions intended to improve artisanal livelihoods in rural Pakistan under the RANG project.

Disclaimer and Copyright

Acknowledgements

Any completed project results from the joint efforts of the individuals in the project team. This study is the result of the hard work and the untiring efforts of the following people:

- ✓ **Tahir Iqbal**, Project Leader, FCGHC, ensured the timely execution of field activities and conducted the literature review that provided the backbone of the research framework.
- ✓ **Shahzad Bukhari**, Enterprise and Gender Expert, helped immensely with formulating the analysis and resulting recommendations.
- ✓ **Mohammad Rana Imran**, Enterprise Manager, FCGHC, ensured the timely completion of field activities in Punjab.
- ✓ **Zaman Ansari,** Data Processing Manager, FCG, converted raw data into readable, color-coded graphs.
- ✓ **Aysha Adil**, Project Director, IHT, provided useful comments at the research design stage.
- ✓ **Moyna Aikin**, Board Member, IHT, provided valuable inputs in finalizing the report and connected with fashion experts from whom we gathered valuable insights though in-depth interviews.
- ✓ **Ramsha Shadab** and **Simra Shadab**, Junior Research Associates, FCGHC, provided valuable assistance in compiling the results and findings of the survey.

We have made all efforts to ensure the accuracy of the data presented and the interpretation thereof. Any errors that may remain are solely my responsibility.

Shadab Fariduddin
CEO and Lead Consultant
FCG Human Capital Pvt. Limited
Karachi, Pakistan
October 1, 2015
Email: shadab@fourcg.com; sfuddin@gmail.com

Abbreviations

CBO	Community Based Organization
CP	(NGO partners) Collaborating Partners
VO	Village Organization
AC	Artisan Cluster
BSQ	Baseline Survey Questionnaire
Bhl	Bahawalpur
CE	Cluster Enterprise
DGK	Dera Ghazi Khan
FCGHC	FCG Human Capital
Hyd	Hyderabad
IDI	In-Depth Interview
IHT	Indus Heritage Trust
Muz Garh	Muzzafar Garh
R&D	Research and Development
PPAF	Pakistan Poverty Alleviation Fund
PSFD	Pakistan School of Fashion Design
SHG	Self-Help Group
VC	Value Chain
WB	World Bank

Table of Contents

Executive Summary

This report presents the findings of the Baseline Study, conducted between June and August 2015 by the FCG Human Capital for the RANG project, which is to be implemented by the Indus Heritage Trust. Funding for the Baseline Study was provided to the Trust by the World Bank.

Previous studies have identified many of the problems faced by rural artisans in Southern Punjab and Sindh in their efforts to earn a living from their crafts. These include the poverty of the artisans; the lack of access to affordable credit; the difficulties they have in getting fair prices for their products and the erosion of traditional markets due to competition from mass-produced and imported goods. Other social factors which reduce the viability of handicraft sales include the limitations placed on women's mobility and their lack of knowledge of market prices and market dynamics (e.g. the changing demand for fashionable colours and designs).

The RANG (Colour) Project has been designed to revitalise the artisans' livelihoods in 172 villages located in ten districts of Sindh and South Punjab. These are areas that were devastated by floods in 2010 and 2011. The project will assist poor and vulnerable artisan families to re-build and improve their livelihoods. The means to this end include establishing artisanal institutions, designing artisan-specific credit products and developing innovative strategies and brands to market the products.

The objectives of the baseline survey were to gather baseline data from the artisans in 10 of these districts (5 each in Sindh and South Punjab), in order to establish the parameters for measuring the project's results, its long-term impact on the beneficiaries and its cost-effectiveness. For this purpose, the baseline survey collected data on the artisans' socio-economic conditions and their technical skills, as well as identifying in detail the constraints in product development and the marketing mechanisms employed. Since most artisans are small-scale producers it was also necessary to examine the present status of business development support services and to identify the possibilities for scaling up production and improving sales.

Methodology

A literature review was first conducted to provide information on home-based textile production value chains. Seven inter-related areas of value-chain inquiry, of specific relevance to the RANG project, were then categorized. Eight in-depth interviews were conducted to gather qualitative insights from experts in the textile crafts sector.

A 66-item baseline survey questionnaire was designed in English, translated into Urdu and coded for easy administration and later data processing. The questionnaire was piloted with 20-30 artisan households in three locations in district Muzafargar and then finalized for full-scale deployment. 600 people were surveyed (approximately 60 per district). The data was processed using SPSS software. The questionnaire contains some of the most detailed information about textile production ever gathered in these rural communities, with data on monthly outputs, kinds of thread used, names of design motifs and the names of traditional stitches.

Significant Findings

The Literature Review identified numerous problems, including: low or non-existent formal literacy or numeracy; poor quality-control in production; a lack of up-to-date equipment; minimal informal training and almost no little formal training. The artisans are exploited by middlemen who market their products: they lack any technical knowledge of marketing and must usually sell their products at low prices because they need immediate cash. They are usually excluded from urban craft-marketing cooperatives, although some organisations, AHAN and Behbud for example, have been of great help to the artisans. The deeply rural producers lack any knowledge of advertising, although there are indications that some of the younger, urban artisans are turning to the internet to seek current designs.

There is a gendered division of labour in the production chain, with men buying the raw materials and marketing the goods. However, the family crafts business is headed mostly by women themselves as 79 per cent women claimed they were the head of their business. At the same time 19 per cent businesses were reported to be headed by ‘family members’. Top four categories of textile craft that are produced by these artisans are: embroidery items, linen and bed covers, stitched cloth with embroidery, and bridal dresses.

In terms of income, the average monthly family income is around PKR 13,500 overall, with about one fourth of this derived from craft work. Only 26 per cent of the families surveyed want to see their children continue the tradition. They cite economic reasons (e.g., ‘for sake of money’, ‘get a helping hand’) for involving their children; only one per cent of the respondents say their children ‘have an interest’ in carrying on the crafts business.

An overarching issue, for many, is that, although they do earn from producing handicrafts at home, their need to work in agriculture (for cash and a share of food crops) limits the time the can devote to producing handicrafts. The survey also found that most of the artisans do not ‘finish’ the goods they produce, so that hours of skilled labour too often result in products that command low prices in the market. Overall 43 per cent (36 per cent in Sindh and 58 per cent in South Punjab) respondents think they do not get a fair price for their textile crafts. Over 90 per cent respondents in all ten districts think that they should get at least PRK 200 more than the current price they are getting. The surveyed people give these reasons behind their inability to get a 'fair price': no market information, poor negotiation skills, and economic pressure to get cash in hand quickly. It is no surprise that over 80 per cent of them would like to 'know the final market price' and they would use it for 'better selling (price)' and 'better market links with different buyers/agents'.

Long distances to markets and costly transportation are problems for over 50 per cent of artisans in some villages. Costly and poor quality raw materials are also a common problem. Very few people own a sewing or embroidery machine, finding these too expensive. 85 per cent of them hold the view that their craft cannot be produced with machines.

Roughly 50 percent of the respondents are aware of the quality issues their buyers highlight back to them and the top ones are: delay in delivery of work, not according to design, bad craftsmanship, and bad material used. Respondents also identified possible remedial measures (for overcoming these quality issues) such as: better skills through capacity building, use of proper equipment, and improved linkages.

56 per cent of the respondents do not use any advertising and promotion technique for their textile crafts products. Those who do use rely heavily on word-of-mouth, followed by exhibition and display centre, print media and sales promotion. Cited reasons for not using any advertising are: a) financial constraint and b) no need. Interestingly majority of respondents, about 70 per cent of them, are convinced that advertising will help them get more business. Over 80 percent of them favour having more display centres for their products as the best means for promotion and their next best option is 'participating in exhibitions'.

Respondents keep themselves informed about new designs from: a) friends, b) market visits, c) TV and electronic media, d) magazines and design books, e) customers and f) internet and Facebook.

Access to credit is very limited: for the 18 per cent or so of survey respondents who do borrow, relatives are the source of credit. It is clear that the producers have no knowledge of interest rates. 93 per cent of respondents do not have a bank account. The artisans have little or no knowledge, either, of NGOs that offer credit and training that could benefit them.

There are few examples of artisans' self-help groups, and some artisans are linked to well-reputed organisations (private and public) that sell their goods and pay fair prices. Other than this artisans' knowledge about the purpose, importance and functions of a self-help group is very limited.

Overall 68 per cent artisans have had some kind of training in textile production and quality before. However provision of training is quite low in South Punjab as compared to Sindh: 100

per cent in Sindh and 37 per cent in South Punjab reported having some training before. An overwhelming majority, 97 per cent, found the training useful. Reliance is on informal learning however: 80 per cent learned production skills from 'family members and relatives', 20 per cent from NGOs and others like government institute, private skilling centre, and neighbours.

Overall 92 percent of all respondents think they require more skills to improve their livelihood from the textile craft. They were also able to identify competencies they need to improve: quality assurance and enhancement, product development, running a business, marketing and selling, book-keeping, costing and pricing, bargaining and negotiation and modern production techniques. Just 50 per cent of all respondents have received any training in these areas before; in Sindh prevalence of training is 76 per cent compared to 25 per cent in South Punjab. Here again respondents who have undergone training in these areas found the training highly useful. They do however identified weaknesses in previous trainings, such as supply of improper material, no follow-up, despite the promise no generation of 'work orders' after the training, no or little market exposure during training, which IHT can avoid while designing its training interventions.

Recommendations Derived from the Baseline Survey

The consultants recommend the following areas of focus, derived from the baseline survey, that would be valuable in the strategy, design and implementation of the RANG project.

- ✓ Improved raw material purchase and marketing practices
- ✓ Establishing forward linkages so that the products can find markets more easily and so that artisans can be more sure of sustained and regular incomes
- ✓ Improved quality control, up-to-date design and finishing, to meet the demands of high-value niche markets
- ✓ Improved access to affordable credit with corresponding 'financial literacy' and business skills.
- ✓ The creation of an enabling environment in which to ally themselves with other artisans. The resulting 'platforms' will enable these groups to purchase better raw materials, to produce high quality goods that will command higher prices. Timely and proper institutionalization of self-help groups and artisan councils can indeed be highly effective.
- ✓ Improved flow to artisan families of market information complemented with their capacity building in soft skills.

Background Information

Introduction to Indus Heritage Trust and the RANG Project Design

The Indus Heritage Trust (IHT) is a non-profit organization in Pakistan registered under the Trust Act of 1882. Functioning since 2004, IHT was involved in the designing and setting up of a purpose-built Art and Craft Village in Islamabad, executing the first ever public/private partnership of its kind.

IHT has since continued investing in efforts to improve the livelihoods of skilled artisans. In May 2014 IHT received funding from Japan Social Development Fund (JSDF) to scale up the incomes of poor artisans in South Punjab and Sindh through a value-chain initiative called 'RANG' (Colour'). The 'Project aims to assist an estimated 2,600 vulnerable artisan families at the bottom of the socio-economic pyramid, to help them to rebuild their lives after the floods of 2010 and 2011 and to build sustainable livelihoods through establishing their own artisan institutions, designing artisan specific credit products and developing innovative strategies and brands to market their products.

The project reveals the reality that many grassroots level artisans and their successors are increasingly finding it difficult to earn a living from their ancestral trades and are becoming poorer. Many are abandoning their professions. Creative craft industries have a long and rich tradition. However, the current downward trend, in addition to depriving artisan of their livelihoods, carries the seeds of reducing or eliminating the country's rich heritage of arts and crafts.

The project identifies the following four main reasons for this trend:

- ✓ Out-dated designs of the artisans' products have reduced marketability;
- ✓ Lack of the artisans' ability to directly access markets for their products and the resultant exploitation by middlemen;
- ✓ Lack of access to credit to pay for basic materials for their products such as cloth and thread;
- ✓ Lack of public awareness about the value of hand-made products over machine made products.

After identifying these factors the project developed a strategic approach to address each of the four concerns. The project selected five districts in south Punjab and five districts in Sindh for its operations. These districts all have a rich heritage in arts and crafts and each has been deeply affected by the identified adverse trends. The project will carry out a detailed baseline survey in these districts. Based on the findings of this survey the Project will select villages for its assistance. The Project, in collaboration with NGO partners, Collaborating Partners (CPs) and the Village Organizations (VOs) and Community Based Organizations (CBOs) established by them, will select a minimum of 15 grassroots level artisans in each of these villages as Project beneficiaries.

The selected artisans of three to four villages will be grouped together in an Artisan Cluster (AC). 15 Cluster Enterprises (CE) will then be established, drawing from groups of Artisan Clusters. Every CE will be an artisan-owned institution/enterprise that will support capacity building activities for the artisans and provide them access to credit. Provincial Coordinators hired by the Project will facilitate the AC and CE related activities.

Project RANG plans to reach out to 172 villages in the following districts.

No.	Districts	Villages	Beneficiaries *Min. 20 Artisans selected per village*
PUNJAB PROVINCE			
1	Bahawalpur	24	360
2	Dera Ghazi Khan	13	190
3	Multan	20	300
4	Muzaffargarh	24	360
5	Rahim Yar Khan	22	330
Sub-total		103	1,540

SINDH PROVINCE			
6	Hyderabad	13	200
7	Khairpur	13	200
8	Sukkur	13	200
9	Tharparker	13	200
10	Thatta	17	260
Sub-total		69	1060
Grand Total		**172**	**2,600**

The project rests on four pillars:

- ✓ Cluster Development and Capacity Building
- ✓ Artisan Cluster Investment Fund Marketing,
- ✓ Trade Facilitation and Support Services
- ✓ M & E and Knowledge Dissemination.

About the Baseline Study for Project RANG

Need and Purpose

RANG wishes to undertake a comprehensive survey through which to gather specific information[1] related to the project. This will include:

1. Basic socio-economic conditions of Artisans including beneficiaries (if already identified) as well as a non- beneficiaries control group;
2. Levels of technical skills of the artisans, identification of constraints and gaps in quality product development, sales with type of buyers and markets and productivity level (quantity produced and sold);
3. Levels of knowledge about stitches, brands and specifications of different market segments, (e.g. what product specifications requirements are met, what are not; rejection rate and reasons), existing production, quality control and order management practices;
4. Constraints in building local-level artisan institutions, business development support services required for production and marketing (at scale), innovation in designs, order management and quality raw materials;
5. Savings, access to finance and market linkages.

The purpose of the study is to provide a baseline from which to measure the programme results, impact and long lasting change in the lives of the beneficiaries at the end of the project. It will also make it possible to ascertain the cost effectiveness of the implementation of the programme (value for money) and to examine diverse aspects such as geographical spread (rural/urban), socio-economic factors (gender, ethnicity and poverty levels) and the factors related to artisans' skills and the impact if all these factors on the livelihoods of the artisans and especially on poverty-stricken artisans.

Objectives

The baseline is expected to2:

a) Establish parameters for the measurement of RANGs programme results and impact;
b) Collect baseline data according to the specific output and outcome indicators of the project as stipulated in the log-frame;
c) Establish parameters for the measurement of the project impact and long-term changes in the lives of the beneficiaries; and

[1] As given in the published TOR.
[2] *Ibid.*

d) Establish the parameters for the measurement of the projects implementation on cost effectiveness (value for money).

e) Establish parameters for measuring diverse aspects of location (rural or urban), gender, ethnicity and poverty levels, and factors related to artisans' skills.

f) Establish p parameters for measuring "quality environment" during the intervention, in the artisans' communities.

Research Design, Stages and Methods (qualitative and quantitative)

Literature Review

A thorough literature review was carried out to determine the best research variables. Secondary literature on the topic of 'handicrafts marketing and sector development' was carefully chosen to learn from value chain development initiatives in Pakistan and other developing countries. Insights gleaned from the literature review were categorized into seven inter-related areas of value-chain inquiry specific to the project requirements

Development of Research Tools

Subsequent to the literature review, two research tools were designed as per the proposed research plan. These are discussed below.

Guidelines for In-Depth *Interviews to gather qualitative insights from experts in the textile crafts sector (Annex 1).*

In addition, interviews were conducted with nine experts, listed in Annex 4.

A Baseline Survey Questionnaire (BSQ) contained 66 items divided into seven areas of inquiry as distilled from the literature review. The tool was designed in English, translated into Urdu and coded for easy administration in the field and later data processing. The BSQ was piloted with 20-30 respondents at three locations in Muzaffargar before it was finalized for full-scale deployment to the sample population in Sindh and South Punjab (Annex 2).

Sampling and Field Execution

A random sample of 600 households in 10 districts was calculated for field execution as follows:

Total Artisan Families	**2,600**
Margin of Error	**4**
Confidence Level	**95%**
Sample Calculated	**488**
Rounded to	**500**
Provision for Non-Responsive Households	**100**
Sample for Baseline	**600**
Per District	**60**

The final district-wise distribution of baseline survey respondents is shown below. A list of villages surveyed appears as Annex 3.

South Punjab

Bahawalpur	**59**
Vehari	**60**
Lodhran	**61**
Muzaffargarh	**60**
Dera Ghazi Khan	**60**
Total	**300**

Sindh

Sukkur	**60**
Khairpur	**60**
Hyderabad	**60**
Thatta	**60**
Tharparker	**60**
Total	**300**

Data Processing and Graphical Presentation

Survey data was processed using SPSS software and the findings are presented as descriptive statistics. Experts' IDIs were tape-recorded and transcribed to deepen the quantitative insights and to support they survey findings, where applicable.

Readers are advised to keep the following conditions in mind while reading the graphical presentation.

- ✓ Each graph contains 10 bars; one for each of the five districts in two provinces (10 bars).
- ✓ Findings from the five districts in each province are aggregated into two provincial depictions (2 bars).

- ✓ The two provincial data bars are then aggregated for the total sample of 600 (1 bar).
- ✓ Within each bar percentages to the questions are shown.
- ✓ Where a question is close-ended and allows for a single response (i.e. respondents asked to pick one choice only) the percentage within each bar will total 100 percent.
- ✓ Where a question is close-ended and allows for multiple responses (i.e. respondents were asked to tick all responses that apply) the percentage may exceed 100 per cent.
- ✓ In some cases percentages have been computed by SPSS software to one decimal point (e.g. 71.7) but in the write up they have been rounded up or down to the nearest complete integer (e.g. 72).

Limitations of the Baseline Research

The overall research design is very robust as is the extent of data collected. However, FCGHC feels that FGDs with primary respondents would have been valuable. Because of budget constraints the FGDs were omitted from the research design: however, FCGHC feels sure that this omission has not compromised the quality of the findings. IHT's internal M&E system can gather qualitative insights over the course of the program for a meaningful analysis at the time of the project's end-line survey.

Significance of the Baseline Study

This baseline study commissioned by IHT for the RANG project is significant in the following ways:

- ✓ It is the only study that has focused on value chain of textile crafts in impoverished rural areas of Pakistan, specifically South Punjab and Sindh.
- ✓ The study comprehensively and simultaneously examines seven aspects of artisanal value chains and institutionalization requirements at the same time.
- ✓ It is therefore an important contribution to the available literature on the development of textile crafts sector

Literature Review

Introduction

The Handicrafts sector provides livelihoods for thousands of artisans and provides avenues for the realization of the social and cultural potential of millions of people. The mythological, religious, social, historical and artistic expressions in crafts symbolize the strengths of heritage (Khan and Amir, 2013). Handicrafts are the products of creativity and workmanship. Artisans usually, strive for excellence in their crafts (Ibid.) Handicraft production is a major form of employment in Pakistan, as in many developing countries, and is often a significant part of the export economy.

Artisans in Sindh and South Punjab produce hand embroidery, Chunri (decorated dress material), Pit-Loom weaving, Palm Leaf Weaving, Carpet Weaving, Pottery, Ralli (quilted bed covers) Bead Work, Falasi (Sheep Wool Carpets) and khais (light cotton blanket). In the desert, ralli is also called rindhi or gindhi. Mostly the colorful cheeth (cotton cloth), which is a commonly used cloth for apparel, is used to make rillis. The shawls (also called Salari) are plain with colourful border (THAAP Consultancy and Advisory Services, 2010).

Involvement of family members

These crafts are practiced mostly by women and their families in the villages for their families' economic survival (Directorate of Industries, Punjab, 2012). For example, mothers make the thread for shawls on the traditional charkha (spinning wheel) and the sons make the shawls on pit-looms[3] (THAAP, 2010). Men are also involved with embroidery work, usually working at an "adda" (large frame) for the commercial market (THAAP Consultancy and Advisory Services, 2010)

Procurement of Raw Materials and Production of Crafts

The procurement of raw materials is very simple. The middle men, middle women or investors (customers) provide the raw materials and the artisans' only cost is his or her time. The middlemen are responsible for taking the products to the city handicraft markets (ECDI, 2003). According to Anam Shaikh (no date), the artisans often find it difficult to buy enough high quality raw materials at the same time. The issue is complicated further by the availability of the artisans and/or the complex procedures required to make the crafts.

[3] It can take up to one week to make one shawl (THAAP, 2010) and if there is not enough wool available, it can take even longer.

Types of Stitches

A wide variety stitches and hand-embroidery are used by the artisans. The most popular stitches (tankas) are known as Kacha Tanka, Katcha Pucca Tanka, Aari Tanka, Salma Sitra, Gota Kinari and Chickan Kari (THAAP Consultancy and Advisory Services, 2010).

Equipment Issues

Saba Iqbal Quddusi (2011) found that artisans cannot compete with mass-produced goods in the market. Quddusi found that lack of innovation and technical equipment are the major hurdles which limit the artisans' abilities to sell enough to regain their earlier reputation and markets for their goods

In countries like India and to a much smaller extent in some other countries, computerized technological advancements make it possible for artisan to produce thousands of designs resulting in a huge variety of goods for export. (Shaikh, no date). For most handicraft items in Pakistan, however, there has been little or no competition from so far (Khan and Amir, 2013).

Quality Control and Training

The village artisans seem unaware of quality control for their products. A main reason is poor designs, as the artisans have no orientation to new designs, preferring, instead, to follow their traditional designs. Another reason is the low quality of available materials which they are bound to buy. A third reason is the lack of training on both awareness about quality parameters (Khan and Amir, 2013)

Most rural women artisans have no formal schooling or only primary education. Most of them learn needlework from their mothers and grandmothers. Few artisans have the opportunity to attend any formal vocational training. Urban artisans, on the other hand, can attend courses by paying subsidized fees in government, private or NGO-run institutes (ECDI, 2003). Usually the training in embroidery is given to the young girls by their elders or by the traditional teachers who teach them the Quran as well as survival skills. There are also some Dastakari (handicraft) centers operated by some of the enterprising women of the villages where the craft training is formally given (THAAP Consultancy and Advisory Services, 2010).

Designing and Market Information

The artisans receive information about current trends and fashions from different sources, while they get information about designs and trends from their customers and middlepersons. It is important to mention that the design of home-made crafts is determined by purchasing patterns which inform them about the economic status of consumers in end markets (Khan and Amir, 2013).

The naming of design or stitches based on animal name and husband name. Black became "Bhanis" (water buffalo). Moreover, designs and stitches are also named after political figures, for example so there is a Benazir Tanka and a Nawaz Sharif Tanka in South Punjab region

(THAAP Consultancy and Advisory Services, 2010). There are also local and ordinary name of stitched, kacha tanka and pakka tanaka etc.

The artisans have to keep in mind the changing needs and wishes of the consumers, especially when these come from foreign markets (Khan and Amir, 2013). The factors described here lead to an essential maxim: the handicraft items are carefully made by artisans so that they retain their distinctive 'ethnic value', while being put to modern day use.

It has been found that artisans do not have copyrights for their handicrafts, so cannot 'brand' their designs. They are not aware the concept of copyright nor the process of gaining a copyright. If they were to seek to copyright an item they would also have to learn how to file a claim for copyright (Khan and Amir, 2013). They should be taught the requirements of this process, but it will be a complex procedure for them. .

Selling, Marketing and Making Forward Linkages: A circle of problems

The selling and marketing of crafts takes different forms, none of which benefit the artisans. The first is that of selling their crafts in the local markets. Salari (a craft) is one example: it is sold in local markets and it is used at weddings and other happy occasions to welcome guests and the bridal party. Another way is that the artisans supply the crafts to the market on a monthly basis in the handicraft and embroidered handicrafts sector (ECDI, 2003).

Moreover, as noted above, the artisans depend on the middleman; dealers and master craftsmen for selling handicrafts to consumers. The sales markets purchase handicrafts from dealers and master craftsmen; but not from the artisans (Khan and Amir, 2013). A small number of artisans sell their crafts directly to their customers (Khan and Amir, 2013).

The other way is that the handicraft artisans sell to associations or NGOs, which in turn, sell to customers through private or government sales emporia. The artisans can also sell their crafts to a co-operative society which sells to the association of traders and businessmen: these then sell to state owned emporia which sell to customers (Khan and Amir, 2013).

Earlier research has shown that most artisans (especially those who rarely travel outside their villages) are not aware of consumer needs and wants. If he or she makes something good, but is unable to market it, it results in dissatisfaction and possibly debt: many artisans are leaving their profession and joining another, as a result. There is a need to raise awareness on how to sustain their work by communicating and coordinating with market actors (Shaikh, no date).

The artisans have little knowledge and market information relating to their products (Khan and Amir, 2013) and are exploited by middleman. They also cannot determine the price of their crafts. Moreover, they cannot estimate the exact cost of production, for several reasons. Prices are determined by market acceptance and the middleman's level of profit (Khan and Amir, 2013).

Exploitation of the Artisans

Exploitation takes many forms. One is that there is limited value addition (Inter cooperation Pakistan, August 2009). Another is inefficient market approaches, as noted above (Khan and Amir, 2013). The poor economic conditions and financial constraints force the artisans to sell their crafts at very nominal rates because they need money to meet their daily and weekly expenditures. They also produce things on a very small scale. The middlemen and retailers often charge a markup of 50 per cent to 100 per cent on the quoted price of the products, and payments are made to the artisan women after the goods are sold. ECDI, 2003). Most villages have local sub-contractors who hand out work to the various embroiderers in their village. In some cases, the artisans are paid in advance to meet their expenditures and the middlemen buy the crafts at their own rates (Inter cooperation Pakistan, August 2009).

Other reasons for poor sales and profits include poor designs, the use of low quality materials: these weaknesses are exploited by urban craft units, who apparently lock out village crafts from global markets (Khan and Amir, 2013).

Advertising, Access to Finance and Skills

The costs, lack of information about marketing techniques and lack of formal literacy do not permit the craftsmen to advertising of their products individually. For the promotion of handicrafts in India, the All India Handicraft Development Corporation has been undertaking publicity, exhibitions, printing of brochures, and participation in trade fairs (Khan and Amir, 2013). But this type of support is not available from Trade Development Authority of Pakistan or any other institution for promotion of local crafts in Pakistan. Recently Pakistan Poverty Alleviation Fund (PPAF) has undertaken some good, large-scale projects to develop the crafts sector in Pakistan (PPAF Website, 2015) The ability to expand production and sales is clearly limited for the reasons noted above. Expansion can only be undertaken when demand rises. However, expansion involves finances, which is lacking. (Khan and Amir, 2013)

The limited access to institutional credit, the lengthy procedures and low levels of production restrict the artisans' ability to apply for loans. Moreover, the study reveals that lack of collateral, high mark up, cumbersome procedures and non-cooperative attitude of the employees of microfinance banks and NGOs are among the constraints faced with regard to credit (Inter cooperation Pakistan, August 2009). In addition, the majority of artisans is unaware about new schemes like loans at concessional rates, free tools, dyes and chemicals and work shed-cum-housing facilities (Khan and Amir, 2013).

Roles of Research and Development and NGOs

It is understood that research and development in handicrafts, to improve the quality of the products, can play an important role in understanding market trends and demands. Many more new items and new designs can be developed with the help of R & D. (Khan and Amir, 2013). Moreover, value addition can be introduced in handicraft products (like new trendy designs).

The various specialized organizations, NGOs and the government can help the local units to produce value added items. In this way, it would not only help to penetrate the local market, but also help in exporting of such items to international markets (Khan and Amir, 2013).

It has been found that organizations like AHAN4 and Behbud5 are very helpful in promoting artisans' products at the national level. They have shared a lot of information with the artisans to promote their business (Anam Shaikh, no date).

Issues of Capacity Building

The women's participation is restricted by cultural constraints such as their limited ability to move outside their homes their domestic commitment and their other work. Many women work on the land during the sowing and harvesting seasons and are closely involved in stocking the households' annual grain stocks of wheat and rice (THAAP, 2010). Similarly, the cotton season is economically important for them, as they may earn up to PKR 500 (USD 5) per day. This means that women cannot devote time to training in handicraft improvement during these seasons, the length of which is determined by the weather. (THAAP, 2010). Another major factor that limits the artisans' development and economic growth is the lack of artisanal marketing associations and cooperative organizations (Inter cooperation Pakistan, August 2009).

[4] Aik Hunar Aik Nagar (one skill one village); a cluster development initiative
[5] Means 'ADVANCEMENT', is an NGO working to promote women empowerment commercially promoting their crafts: http://behbud.org/our-story/

Key Lessons from the Literature Review

It emerges from the desk review that the following seven areas of a value chain must be developed simultaneously for any meaningful intervention to improve artisanal livelihoods, such as project RANG.

- ✓ Procurement and Backward Linkages
- ✓ Production and Quality Control
- ✓ Design and Finishing
- ✓ Selling, Marketing and Forward Linkages
- ✓ Selling, Marketing and Forward Linkages
- ✓ Access to Finance and Skills
- ✓ Self-Organization/Capacity Building

Questions based on these seven essential areas have been therefore included in the BSQ and IDI tools. The findings of the baseline survey are presented under these topical headings in the following chapters, following a socio-economic profile of the respondents.

Research Findings: Socio-Economic Profile

This chapter provides information on the demographic characteristics of the target artisanal population across the ten districts in South Punjab and Sindh.

The findings are presented in terms of:

- ✓ Family size
- ✓ Number of family persons involved in textile crafts
- ✓ Intentions to involve children along with reasons thereof
- ✓ Roles played by male and female family members
- ✓ Family income versus craftwork income.

Figure 1

The overall family size is seven in both Sindh and South Punjab. No men are involved in textile crafts throughout all surveyed regions. Women dominate the family's involvement in the textile crafts in all ten surveyed Districts in Sindh and South Punjab.

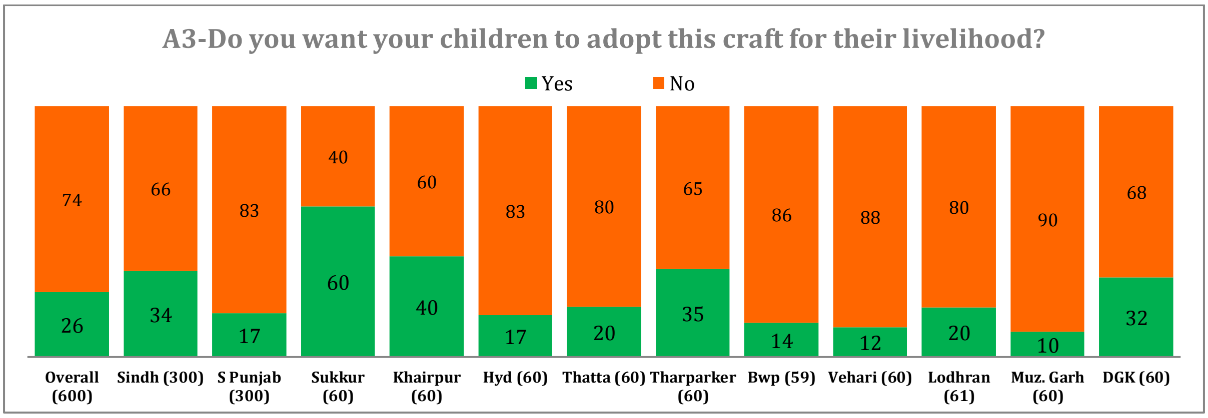


Figure 1

Overall only 26 per cent of respondents want their children to adopt handicraft production for their livelihood. In Sindh 34 per cent of parents said 'yes', which is twice as high as parents in South Punjab, at 17 per cent.

Within Sindh the highest willingness to involve the next generation is found in Sukkur (60 per cent), followed by Khairpur (40 per cent). The lowest level of willingness is found in Hyderabad and Thatta, at 17 and 20 per cent respectively.

In South Punjab there is an across-the-board aversion to allowing children in their trade. The highest willingness comes from DG Khan (32 per cent) followed by parents in Lodhran, where only 20 per cent are willing. Only 10 per cent of respondents in Muzaffargarh, 12 per cent in Vehari and 14 per cent in Bahawalpur think their children should take up this trade. Figures 4 and 5 present a summary of the reasons behind the 'yes' and 'no' answers above.

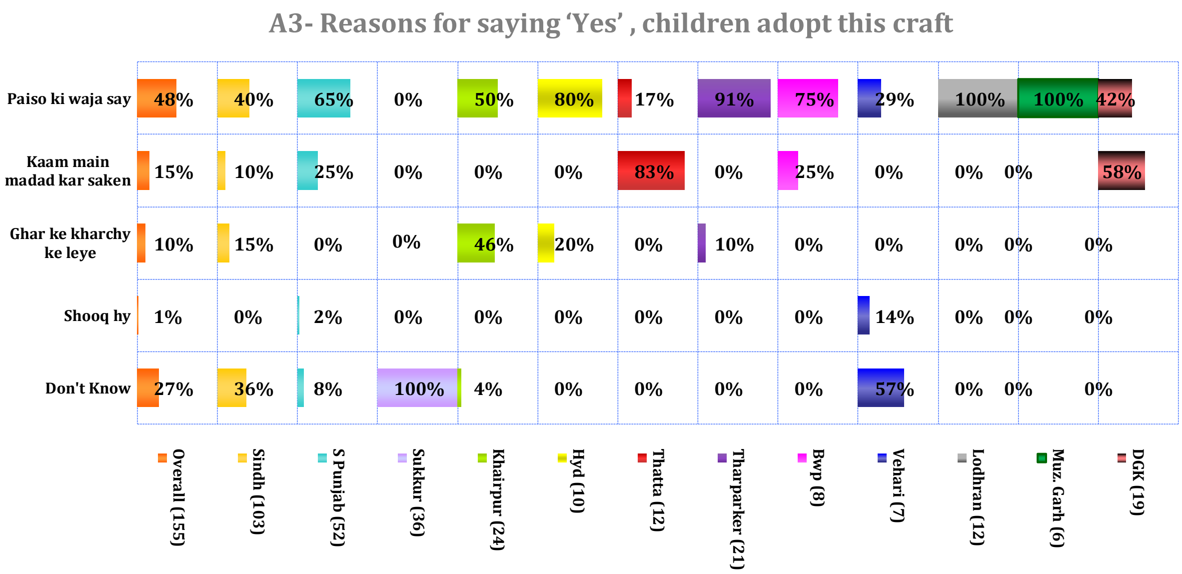


Figure 2

'Paiso ki waja say' means 'for money'. 'Kaam main madad karna' means 'to lend a helping hand'. 'Ghar ke kharchy' means 'because of family expenses. 'Shooq hy' means 'due to personal/own interest in the trade'.

Rows 1 and 3 both indicate economic reasons in the figure above. When these two rows are combined, it emerges that overall 58 per cent of respondents want their children to adopt the craft because the family is in need of more money (48 per cent) or because household expenses need to be supplemented (10 per cent). Only one per cent of the respondents feel that their children have an interest in adopting the craft the family is involved in. 27 per cent of respondents did not cite a reason for not wanting their children to join the family's textile craft production. Overall 15 per cent do seek their children's help and hence want them to join family trade. This reason is higher in South Punjab (25 per cent) than in Sindh (10 per cent).

A3- Reasons for saying children should not adopt this craft

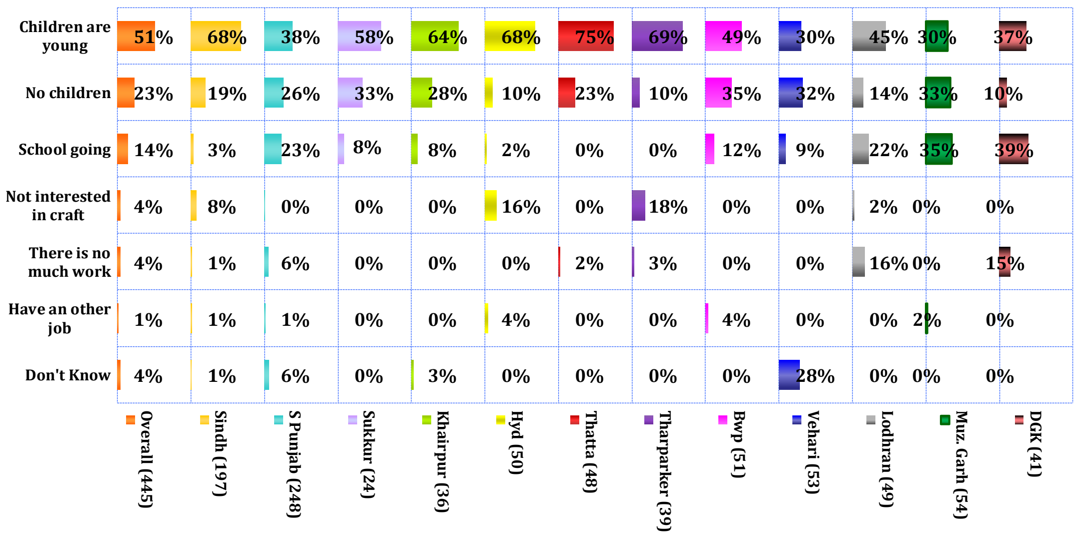


Figure 3

The major reasons why parents don't want their children to adopt family trade are:

1) Children are too young (overall 51 percent; Sindh 68 per cent and South Punjab 38 per cent)
2) Have no children (overall 23 per cent; Sindh 19 per cent and South Punjab 26 per cent)
3) Children go to school (overall 14 per cent; Sind 3 per cent and South Punjab 23 per cent)
4) Children are not interested (overall 4 per cent, dominated by responses from Sindh)
5) There is not enough work to warrant extra 'helping hands' (overall 4 per cent dominated by response from Vehari in South Punjab at 28 per cent).

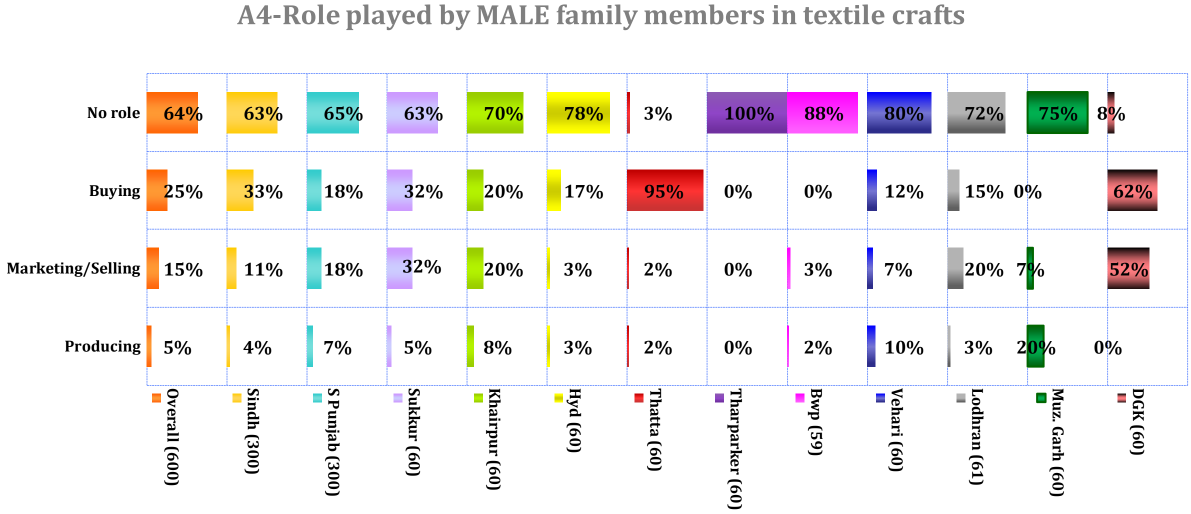


Figure 4

Men in the family are mostly involved in either the backward or forward linkages. Men are almost twice as active in Sindh (33 per cent) as compared to South Punjab (18 per cent) in the 'buying role'. Overall 25 per of cent men perform the buying function in the surveyed artisanal families. Buying is almost exclusively performed by men in Thatta (95 per cent) and predominantly in DGK (62 per cent).

While 15 per cent of families have male family members sell their products on an overall basis, 18 per cent of families in South Punjab rely on men compared with 11 percent in Sindh. Sukkur (32 per cent) and Khairpur (20 per cent) in Sindh and Lodhran (20 per cent) and DGK (52 per cent) in South Punjab are the towns where men are active in marketing and selling of the textile crafts.

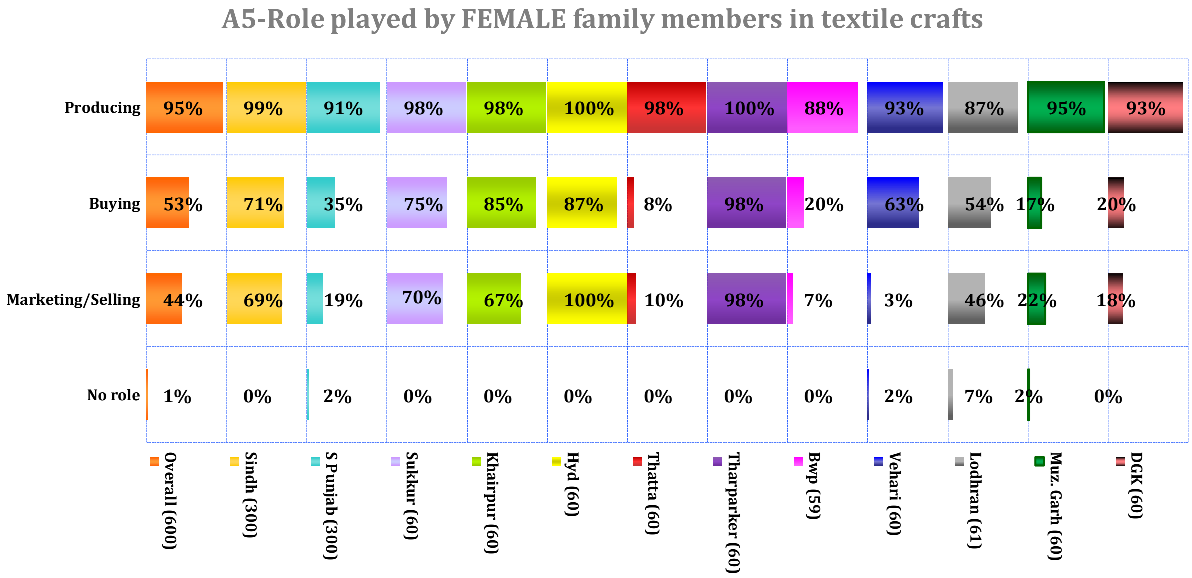


Figure 5

Textile craftswomen in the family play diverse roles in all three stages of the value chain. They dominate the production function across all places and are also quite active in buying and selling of their products. In Hyderabad production and marketing is controlled 100 per cent by the women in the family. The figure is 98 98 per cent in Tharparker. Women's role in buying is most restricted in Thatta (8 per cent), followed by Muzaffar Garh (17 per cent) and DGK (20 per cent). Women's role in selling is most restricted in Vehari (3 per cent), Bahawalpur (7 per cent), Thatta (10 per cent) and DGK (18 per cent). Women in Sindh have more control over the selling function than women in South Punjab (69 per cent versus 19 per cent). Similarly the percentage of women who have a role in buying is 71 per cent in Sindh, which is twice as high as for South Punjab where the figure is 35 per cent.

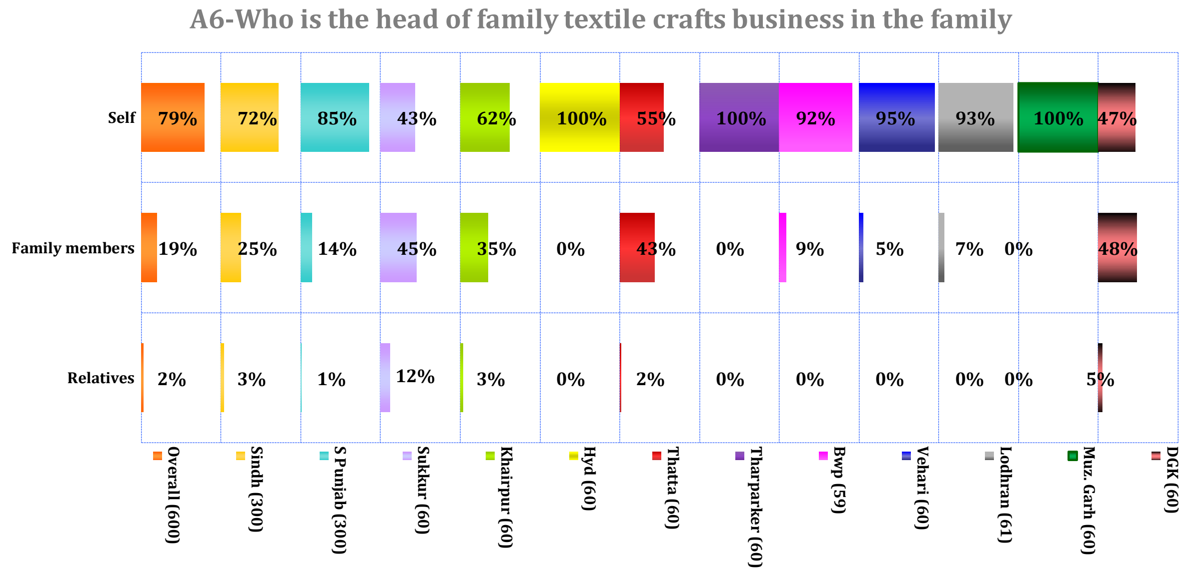


Figure 6

The textile crafts business in the family is headed mostly by women. On an overall basis 79 per cent of women head the business. In Sindh this percentage is 72 and in South Punjab 85 per cent. Interestingly 100 per cent ownership by women is reported in Hyderabad, Tharparker and Muzaffargarh.

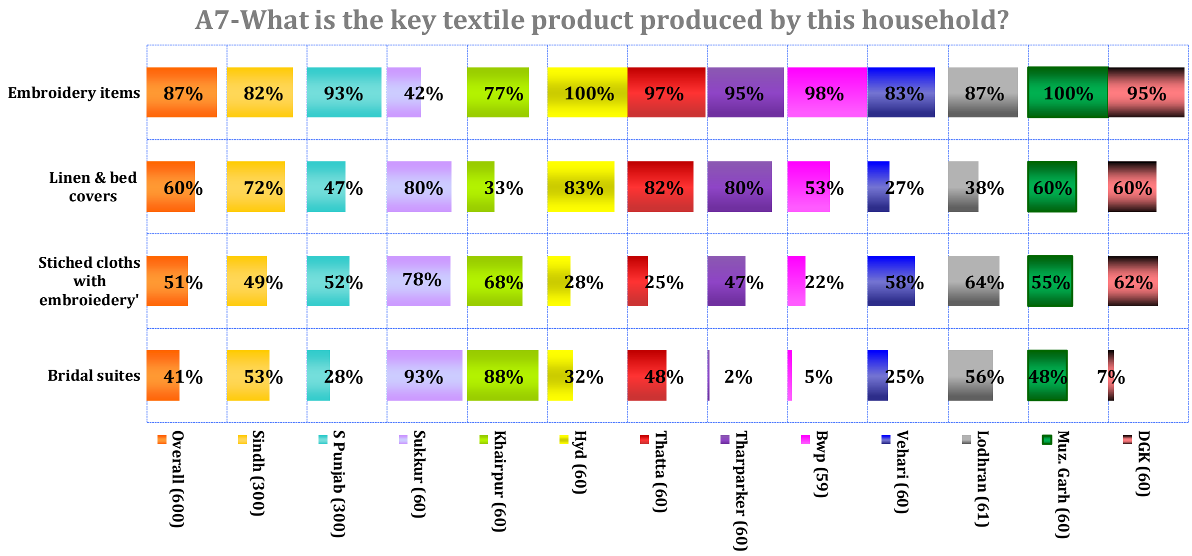


Figure 7

All types of embroidery items are produced by the surveyed households. Bridal suits are not preferred items of production in Tharparker, Bahawalpur and DGK.

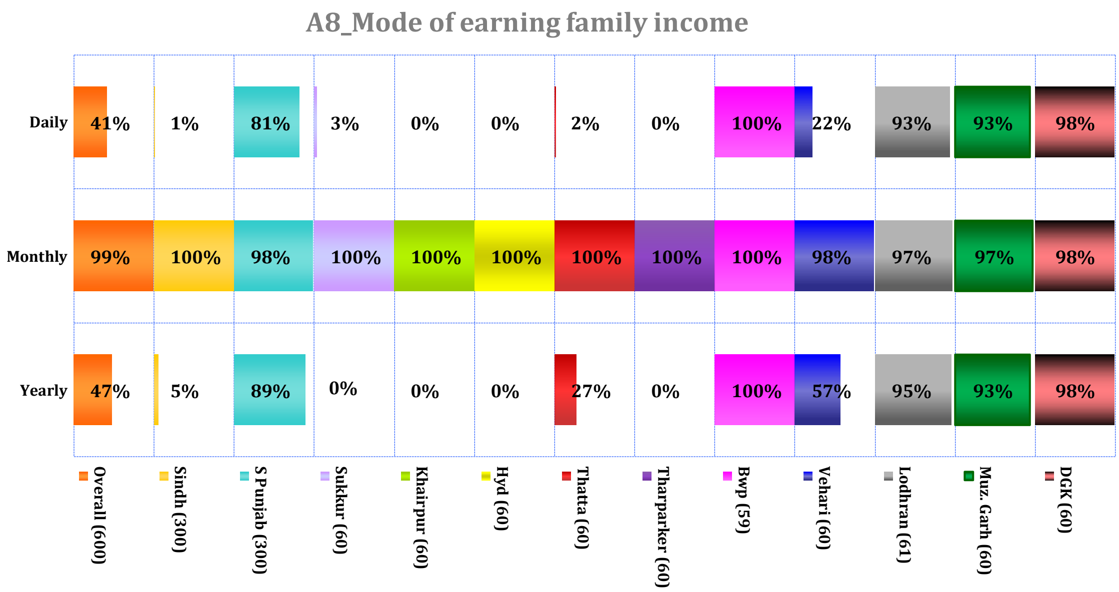


Figure 8

Monthly income is the most common mode of earning for respondents across all towns.

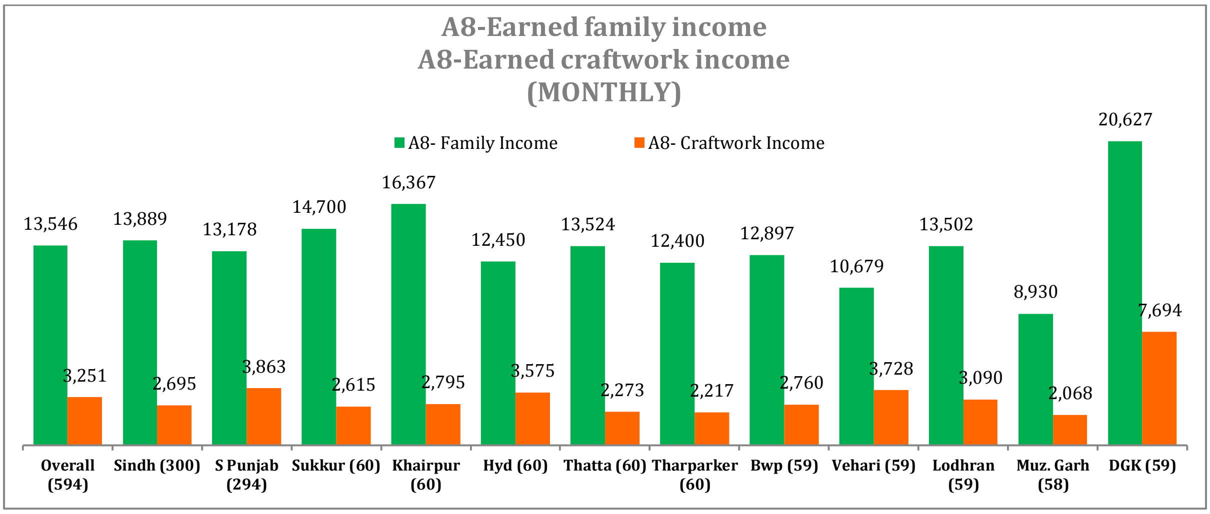


Figure 9

Average monthly family income is around PKR 13,500 ($ 135) overall. It is slightly higher for Sindh (PKR 13,889) and lower for South Punjab (PKR 13,178). Craftwork income is roughly one-fourth of the average reported monthly family income.

Findings on Procurement and Backward Linkage

Procurement and backward linkages from an import pillar of the textile crafts value chain, because the cost of raw material is determined here. Improving the procurement practices of artisans directly increases their incomes. This section documents current practices used by families in their textile craft business. The findings answer some key questions such as:

Who buys the raw materials? Do they pay cash or buy on credit? Are they satisfied with current procurement practices? And if not, what are the reasons for dissatisfaction?

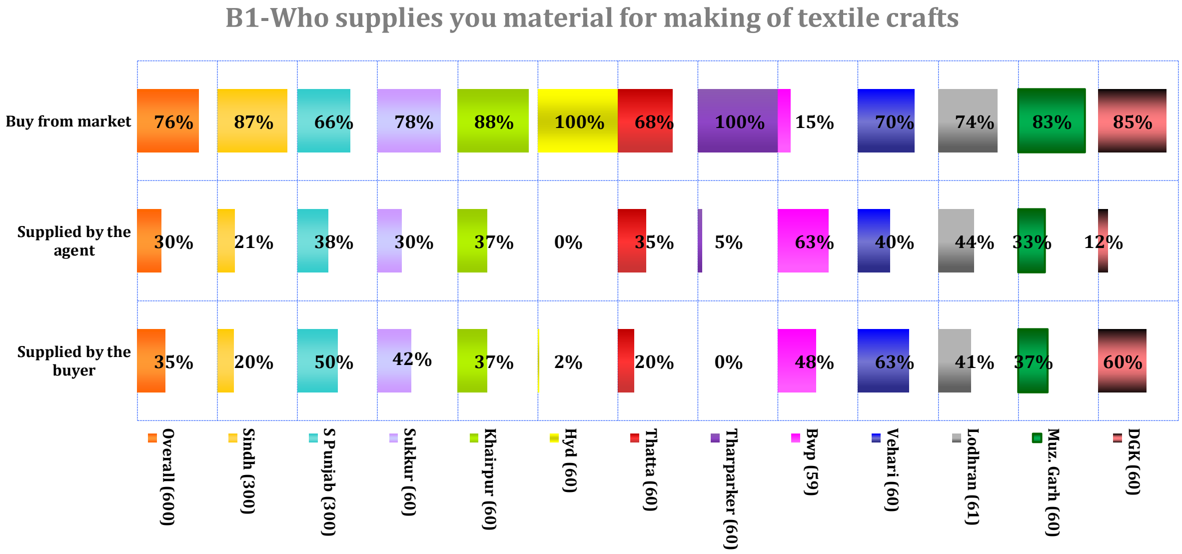


Figure 10

Direct purchase by artisans from the open market is the most common source of getting raw material not only overall but across all towns except Bahawalpur, where only 15 per cent respondents buy raw material directly from the market; raw material is supplied by the agents or the buyers to artisan in Bahawalpur. Overall direct market purchase as source of getting raw material is reported by 76 per cent respondents. The percentage of this practice is much higher in Sindh, 87 per cent, as compared with South Punjab, 66 per cent. Conversely artisans in South Punjab rely more heavily on agents and buyers for getting their raw material than artisans in Sindh. 38 per cent respondents in South Punjab get raw material from agents versus 21 per cent in Sindh. Similarly, 50 percent respondents in South Punjab say that buyers supply them raw material versus only 20 per cent in Sindh.

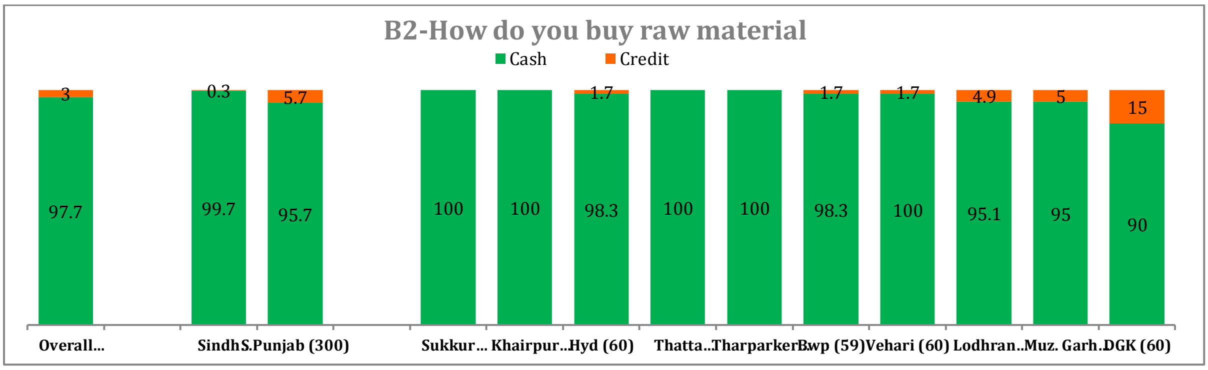


Figure 11

Of the 600 respondents, 98 per cent from Sindh and 96 per cent from South Punjab answered 'cash' while 3 per cent answered 'credit'. 0.3 per cent from Sindh and 6 per cent from South Punjab used credit for this purchase.

All the respondents from Sukkur, Khairpur, Thatta, Tharparker, and Vehari use cash to purchase raw material. In the other cities as well, a significantly high percentages answered 'cash' – 98 per cent from both Hyderabad and Bahawalpur. The highest percentage of people who use credit to purchase raw materials was recorded in DGK (15 per cent).

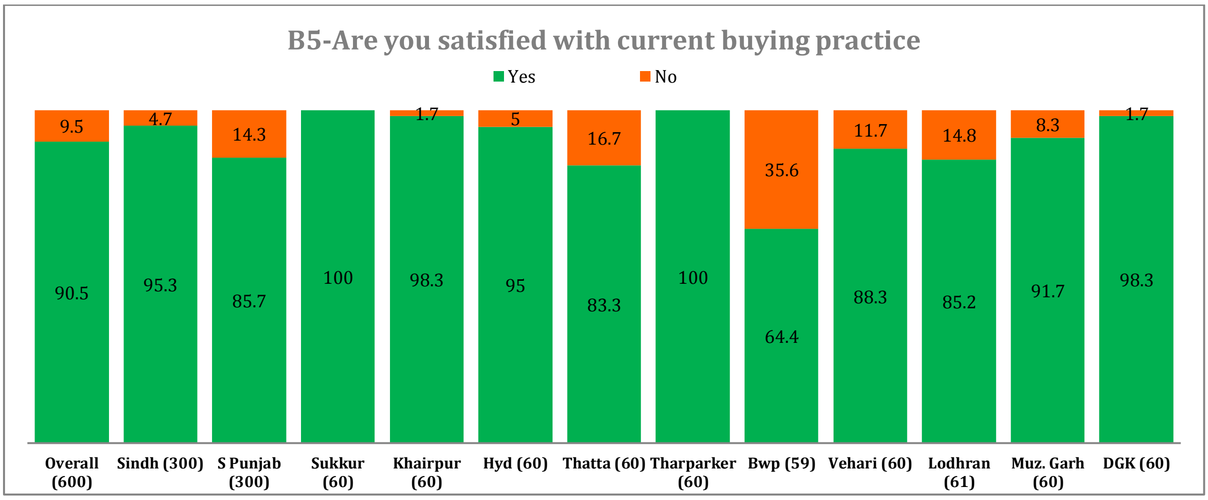


Figure 12

Generally, almost all the respondents are satisfied with their current buying practice, as 90.5 per cent answered 'Yes'. Provincial disaggregation shows that 95.3 per cent from Sindh, and 85.7 per cent from South Punjab are content with their buying practice.

In Sukkur and Tharparker all the respondents agreed. Following closely, 98.3 per cent from both Khairpur and DGK, and 95 per cent from Hyderabad were satisfied. The lowest percentage of satisfied respondents was recorded in Bahawalpur i.e. 64.4 per cent. Significant percentages of 'No' answers were also given from Thatta, Vehari, and Lodhran (16.7 per cent, 11.7 per cent, and 14.8 per cent respectively).

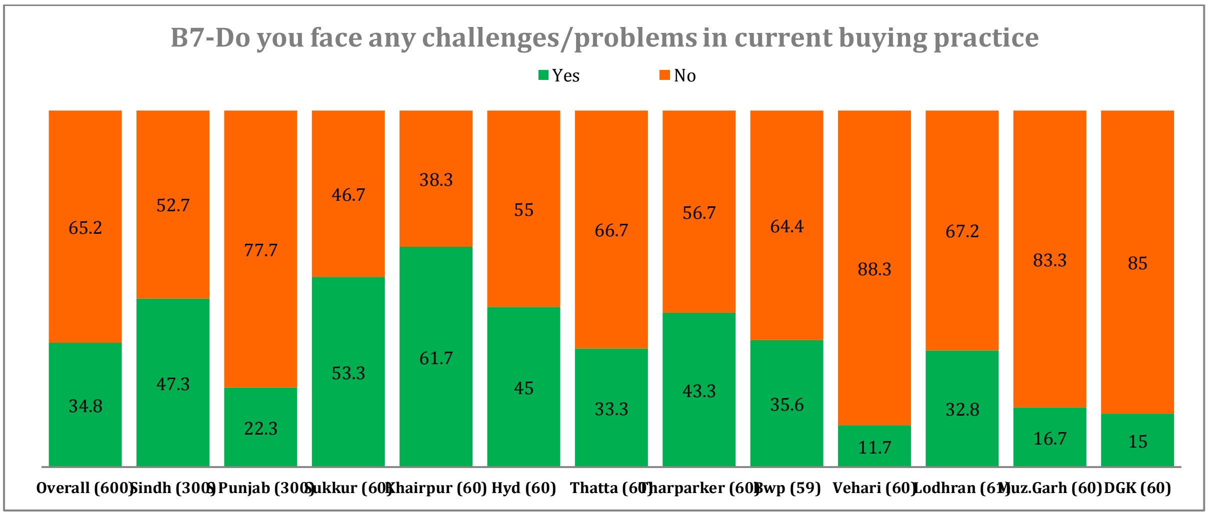


Figure 13

The overall result shows that most of the respondents do not face any problems in their current buying practices, as 65.2 per cent answered 'No'. More respondents answered 'Yes' in Sindh, than in South Punjab (47.3 per cent to 22.3 per cent). The greatest percentages of respondents who do face difficulties were from Khairpur (61.7 per cent) and Sukkur (53.3 per cent). The other cities had lower percentages of respondents answering 'Yes', such as Hyderabad (45 per cent), Tharparker (43.3 per cent), and Bahawalpur (35.6 per cent). The most significant percentages of respondents who do not have problems were recorded in Vehari (88.3 per cent) and DGK (85 per cent).

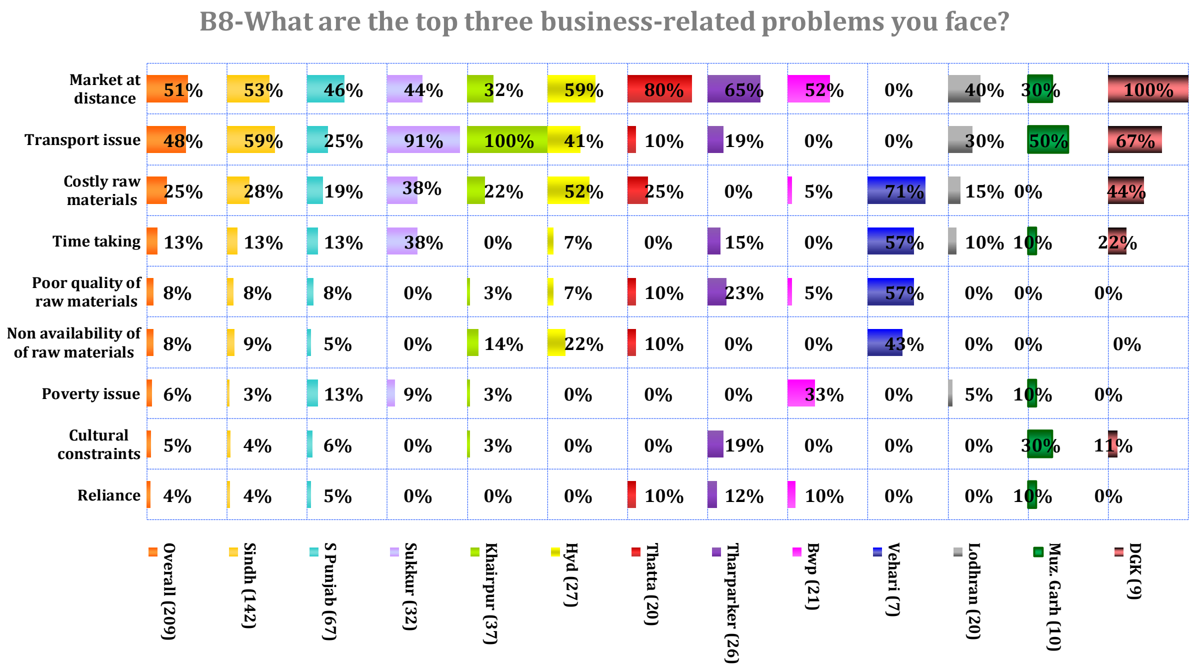


Figure 14

Of the 209 respondents who do face problems in their current buying practice, 51 per cent listed distance from markets as one of their top problems (53 per cent from Sindh and 46 per cent from South Punjab), 48 per cent said 'Transport issue' (59 per cent from Sindh and 25 per cent from South Punjab), 25 per cent said 'Costly raw material' (28 per cent from Sindh and 19 per cent from South Punjab), 13 per cent answered 'Time taking' (13 per cent from both the provinces), 8 per cent 'Poor quality of raw material' (8 per cent from both the provinces), 8 per cent 'Non availability of raw material' (9 per cent from Sindh and 5 per cent from South Punjab), 6 per cent 'Poverty issues' (3 per cent from Sindh, 13 per cent from South Punjab), 5 per cent 'Cultural constraints' (4 per cent Sindh, 6 per cent South Punjab), and 4 per cent 'Reliance' (4 per cent from Sindh, 5 per cent South Punjab).

Distance from the market was the highest-rated problem faced by the respondents. All the respondents from DGK, 80 per cent from Thatta, and 65 per cent from Tharparker listed this. . All the respondents from Khairpur, 91 per cent from Sukkur, and 67 per cent from DGK complained about transport issues. 71 per cent of the respondents from Vehari complained about costly raw materials, 57 per cent mentioned time consumption, and 57 per cent also listed poor quality raw materials as their primary problem.

Production and Quality Control

This chapter presents findings on production and quality control practices in vogue within Sindh and South Punjab.

Questions answered in this section include: Current production capacity; types of textile products produced, types of stiches used in production, steps in production and quality issues faced.

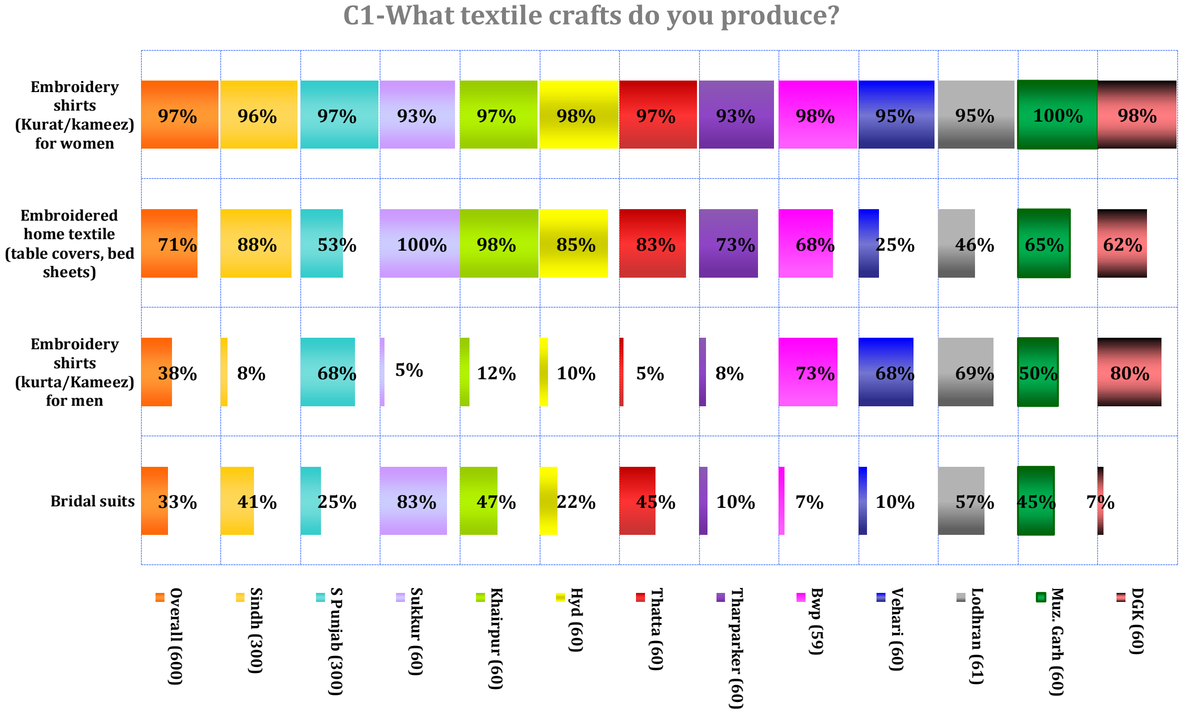


Figure 15

Overall, a striking 97 per cent of the respondents produce embroidered shirts for women (96 per cent from Sindh, 97 per cent from South Punjab); 71 per cent produce embroidered home textiles such as bed sheets and cushion covers etc. (88 per cent from Sindh, 53 per cent from South Punjab); 38 per cent produce embroidered shirts for men (8 per cent from Sindh, 68 per cent from South Punjab), and 33 per cent produce bridal suits (41 per cent from Sindh, 25 per cent from South Punjab).6

Embroidered shirts for women were recorded as the predominant product produced by the respondents in all the cities: 100 per cent in Muzaffargarh, 98 per cent in DGK and 97 per cent in both Thatta and Khairpur. 100 per cent of the respondents from Sukkur, 98 per cent from Khairpur, and 85 per cent from Hyderabad listed embroidered home textiles as their product. The most significant percentage of embroidered shirts for men was yielded from DGK (80 per cent), and for bridal suits was recorded in Sukkur (83 per cent).

6 The bridal suits are very labour intensive and require highly-developed embroidery skills, often using metal threads, sequins and sometimes non-precious stones.

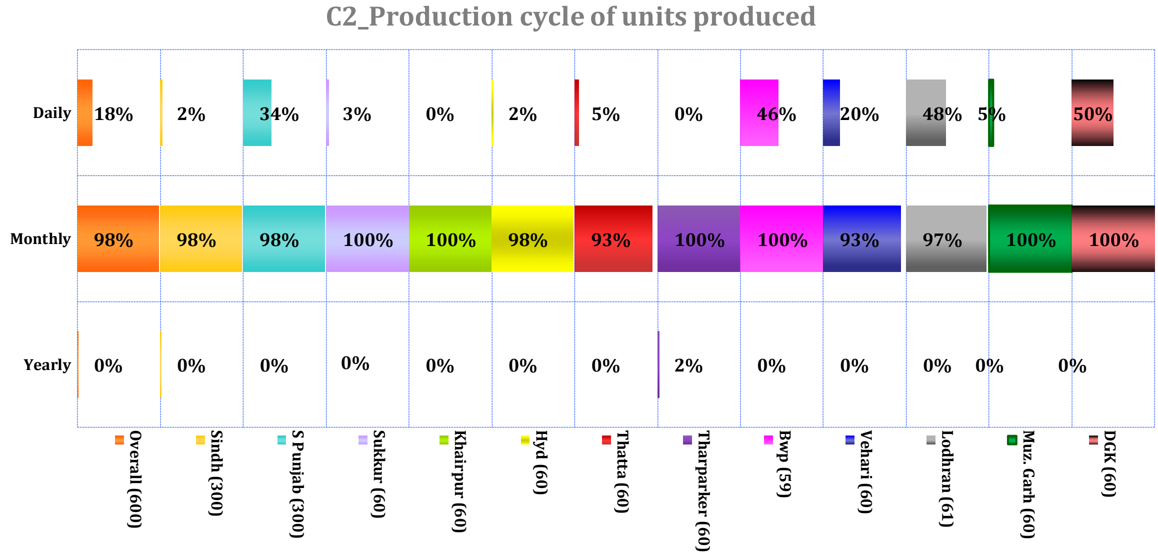


Figure 16

Only 18 per cent of the 600 respondents have a daily production cycle (2 per cent from Sindh, 34 per cent from South Punjab). The majority of respondents (98 per cent) have a monthly production cycle.

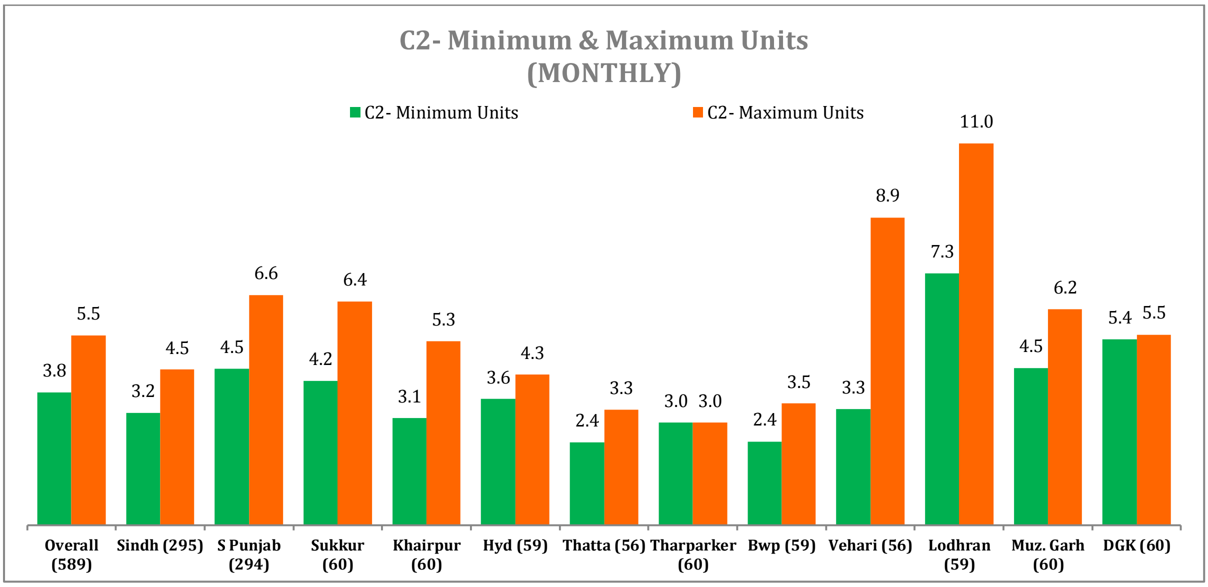


Figure 17

Generally, the overall minimum units[7] of production were recorded 3.8, while the maximum units recorded were 5.5. In Sindh the minimum units are 3.2 and in South Punjab they are 4.2. The maximum units for Sindh and South Punjab are 4.5 and 6.6 respectively.

Of all the cities, the greatest numbers units were recorded in DGK (5.4), Muzaffargarh (4.5), and Sukkur (4.2). The most significant maximum units were recorded in Lodhran, Vehari, and Sukkur (11.0, 8.9, and 6.4 respectively). Vehari shows the most notable difference of 5.6, followed by Lodhran (2.7).

[7] A unit is a piece of textile craft produced

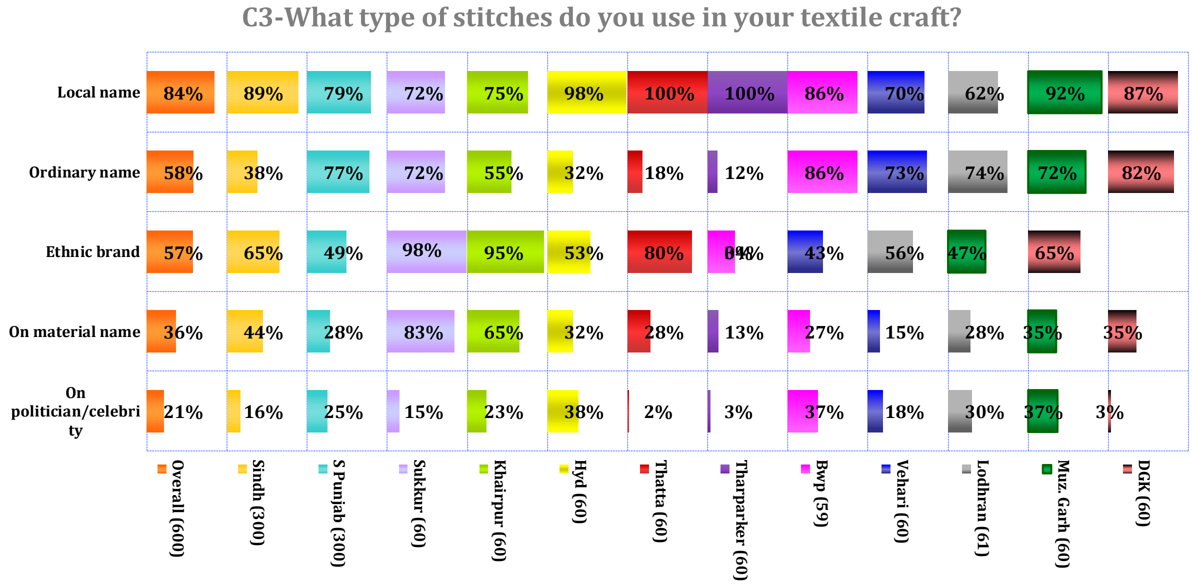


Figure 18

84 per cent of the 600 respondents use 'Local name' stitches in their textile crafts(89 per cent from Sindh, 79 per cent from South Punjab), 58 per cent use 'Ordinary name' (38 per cent Sindh, 77 per cent South Punjab), 57 per cent make use of 'Ethnic brand' (65 per cent Sindh, 49 per cent South Punjab), 36 per cent answered 'On material name' (44 per cent Sindh, 28 per cent South Punjab), and 21 per cent said 'On political/celebrity' (16 per cent from Sindh, and 25 per cent from South Punjab).

From among the cities, 100 per cent of the respondents from Thatta and Tharparker, 98 per cent from Hyderabad, and 92 per cent from Muzaffargarh answered 'Local name'. Bahawalpur, Vehari and DGK were among the prominent cities whose respondents use ordinary name stitches (86 per cent, 73 per cent, and 82 per cent respectively). 98 per cent respondents from Sukkur and 95 per cent from Khairpur use ethnic brand. 83 per cent from Sukkur use 'On material name', and 37 per cent from both Muzaffargarh and Bahawalpur answered 'On political/celebrity/.

Please refer to Annex 4: Name List of Stiches Used

Figure 19

Overall, 91.5 per cent produce their textiles by hand (97 per cent from Sindh, 86 per cent from South Punjab); 5.2 per cent use a sewing machine (1.3 per cent from Sindh, 9 per cent from South Punjab), and 8.5 per cent use both methods (1.7 per cent Sindh, and 15.3 per cent South Punjab).

Large majorities of all the cities produce their textile crafts by hand, as testified by 100 per cent of the respondents from Tharparker, and 98.3 per cent from both Khairpur and Hyderabad. The greatest percentage of machine users was recorded in Vehari (25 per cent), followed by DGK (11.7 per cent). DGK and Muzaffargarh stood out with the highest percentages of respondents who answered 'Both', at 38.3 per cent and 20 per cent respectively.

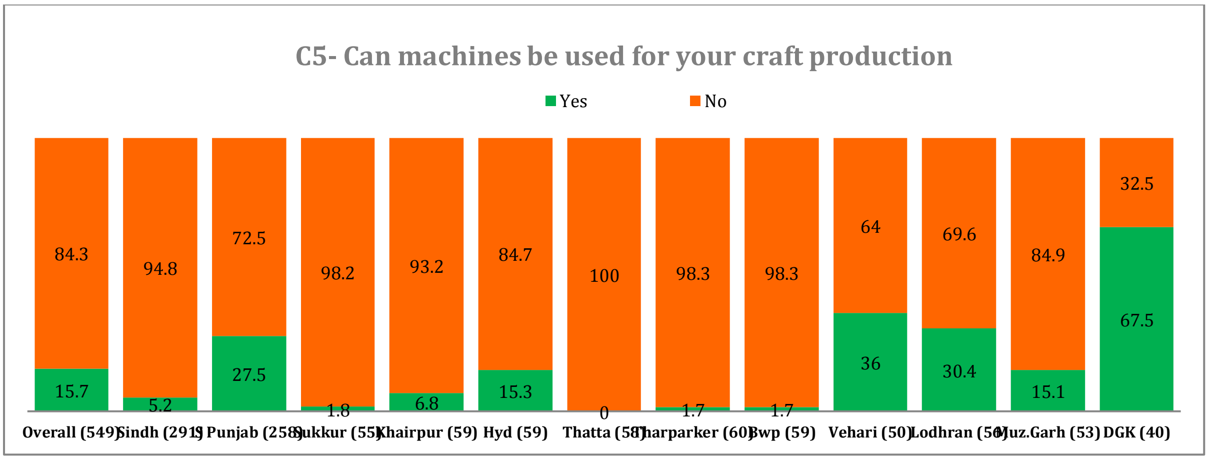


Figure 20

84.3 per cent of the respondents do not believe that machines can be used for the production of their craft (94.8 per cent from Sindh, 72.5 per cent from South Punjab). In Sindh, merely 5.2 per cent said 'Yes' along with 27.5 per cent in South Punjab. The highest percentage of 'Yes' answers was recorded in DGK (67.5), followed by 36 per cent in Vehari and 30.4 per cent in Lodhran. The least number of 'Yes' response was yielded from Thatta (zero), Tharparker (1.7 per cent), Bahawalpur (1.7 per cent), and Sukkur (1.8 per cent). The most notable percentages of respondents who disagree that machines can be used were recorded in Thatta (100 per cent), Sukkur (98.2 per cent), and Khairpur (93.2 per cent).

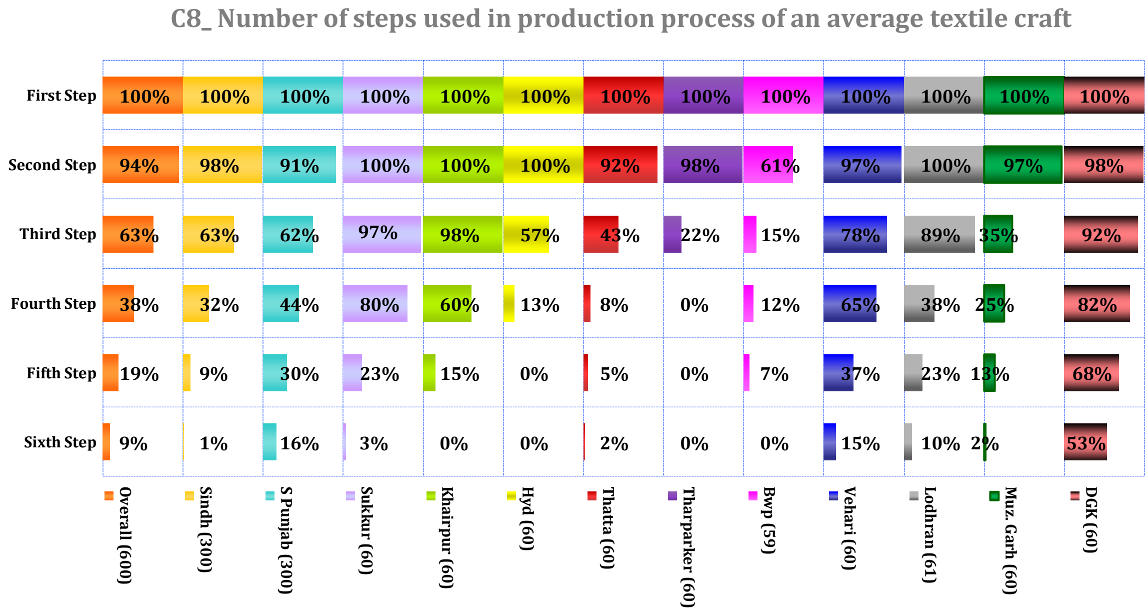


Figure 21

In the production of an average textile craft, all the respondents obviously need the first step, 94 per cent require two steps, 63 per cent require three, 38 per cent require four, 19 per cent require five, and 9 per cent need six steps. The provincial results correspond closely with the overall percentages, except for the fourth, fifth and sixth steps, as 44 per cent of the respondents from South Punjab need the fourth step as opposed to 32 per cent from Sindh. 30 per cent from South Punjab need the fifth step as opposed to only 9 per cent from Sindh; and 16 per cent from South Punjab need the sixth step as compared to only one per cent from Sindh. DGK respondents need the most number of steps in the production of an average textile craft.

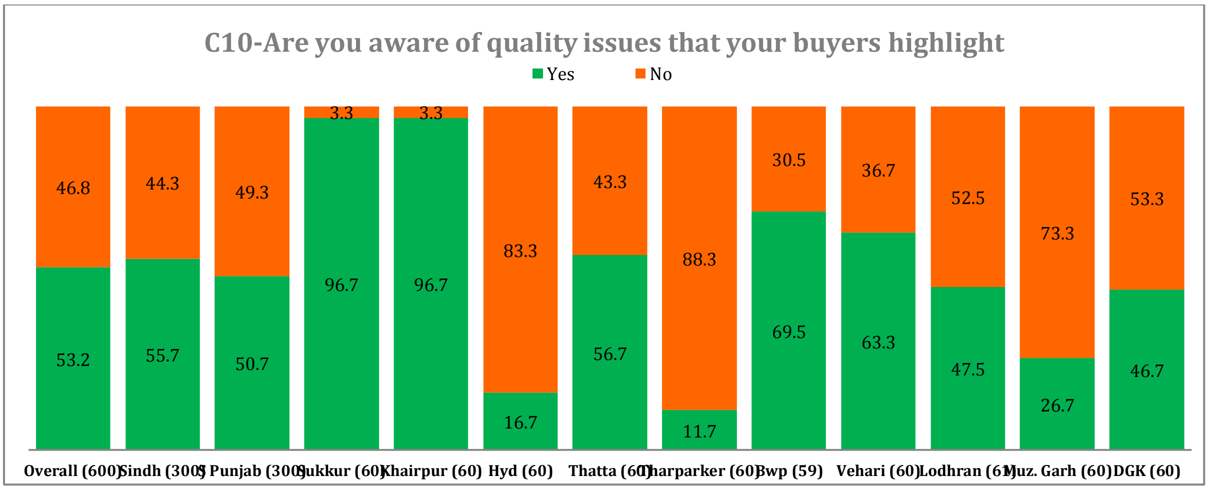


Figure 22

By a very slight margin, more than half (53.2 per cent) of the respondents were aware of the quality issues that are brought forward by their buyers, but a striking 46.8 per cent were unaware. In Sindh 55.7 per cent of respondents and in South Punjab 50.7 per cent were aware of these issues.

Among the cities of Sindh, Sukkur and Khairpur had the highest awareness percentage (97 per cent each). Among the cities located in South Punjab, Bahawalpur had the highest awareness rate (70 per cent). The lowest percentages of respondents who are aware were recorded in Tharparker (12 per cent), Hyderabad (17 per cent), and Muzaffarabad (27 per cent). Tharparker and Hyderabad yielded the most numbers of 'no' responses.

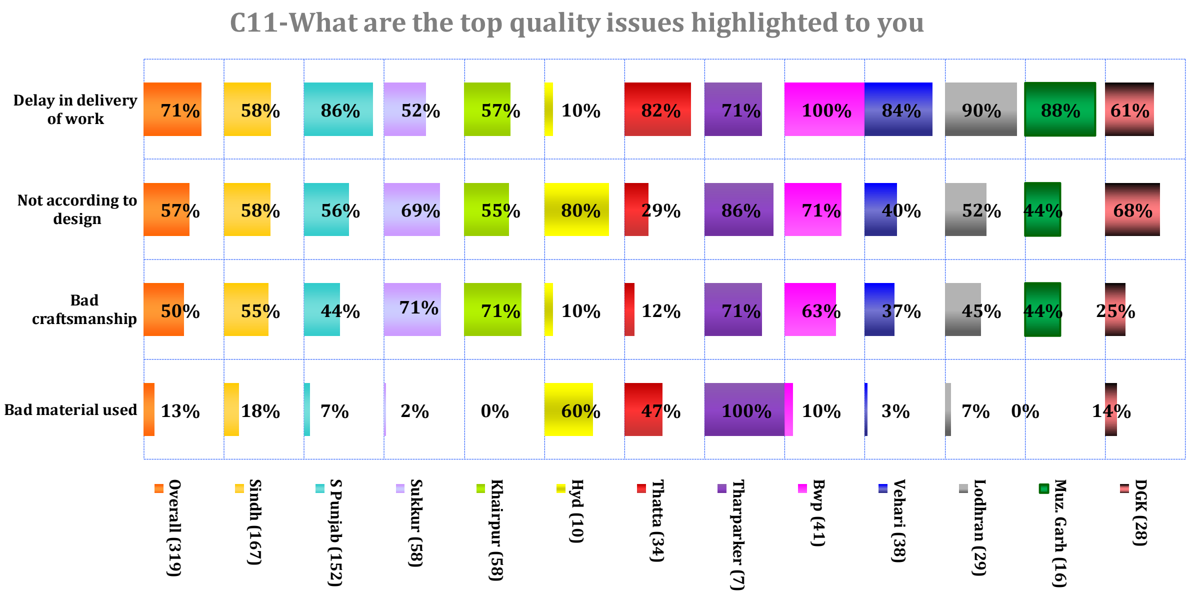


Figure 23

71 per cent of the respondents identified 'delay in delivery' as the most common quality issue (58 per cent from Sindh and 86 per cent from South Punjab). 57 per cent identified 'Not according to design' (58 per cent from Sindh, 56 per cent from South Punjab) and 50 per cent chose 'Bad craftsmanship' (55 per cent from Sindh, 44 per cent South Punjab). 13 per cent answered 'Bad material used' (18 per cent Sindh, 7 per cent South Punjab).

100 per cent of respondents from Bahawalpur, 90 per cent from Lodhran, and 88 per cent from Muzaffargarh identified\ 'delay in delivery' as the top issue;, however, only 10 per cent from Hyderabad agreed. 86 per cent of interviewees from Tharparker, and 80 per cent from Hyderabad picked 'Not according to design'. 71 per cent each from Sukkur, Khairpur, and Tharparker answered 'Bad craftsmanship'. Lastly, all the respondents from Tharparker and 60 per cent from Hyderabad found the use of low-quality material to be the top issue according to their buyers.

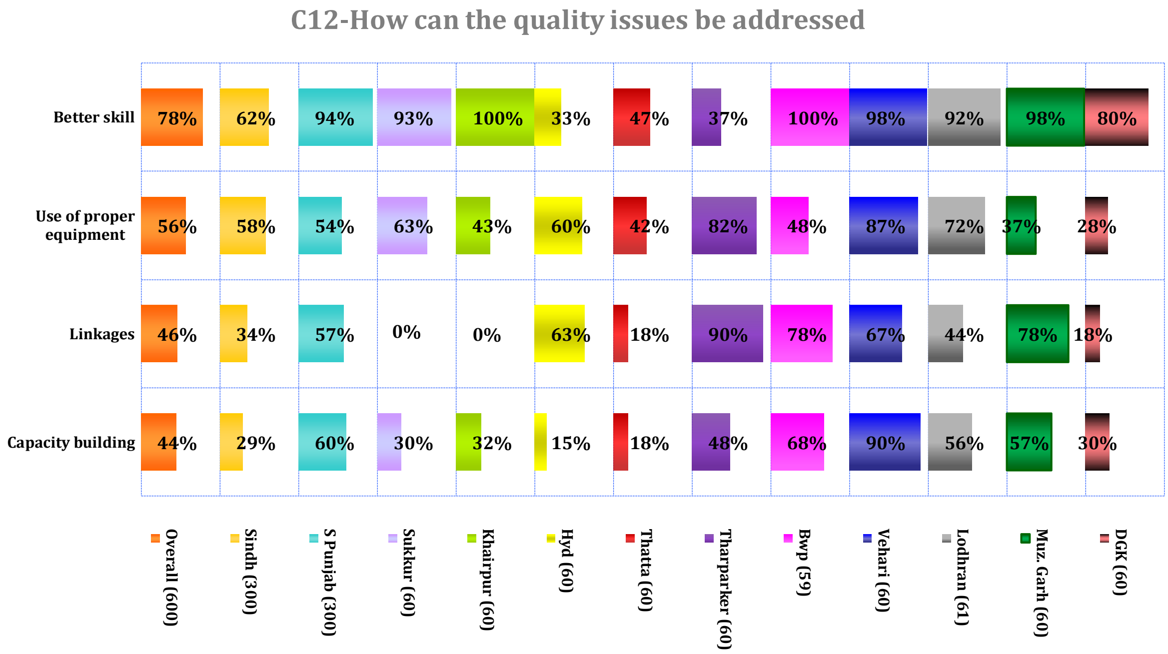


Figure 24

The responses from the 600 interviewees show that 78 per cent (62 per cent Sindh, 94 per cent South Punjab) believe that acquisition of better skills can help solve quality issues. 56 per cent (58 per cent Sindh, 54 per cent South Punjab) marked the use of better equipment as a solution and 46 per cent (34 per cent from Sindh, 57 per cent from South Punjab) answered 'Linkages'. 'Capacity building' was the answered chosen by 44 per cent of all respondents (29 per cent Sindh, 60 per cent South Punjab).

All the respondents from Khairpur and Bahawalpur answered 'Better skill', along with 98 per cent from both Vehari and Muzaffargarh. 82 per cent from Tharparker and 87 per cent from Vehari chose 'Use of better equipment'. 90 per cent of the respondents from Tharparker chose 'Linkages', but none of the respondents from Sukkur and Khairpur agreed. Lastly, 90 per cent of the Vehari respondents believe that capacity building is the best way to address quality issues.

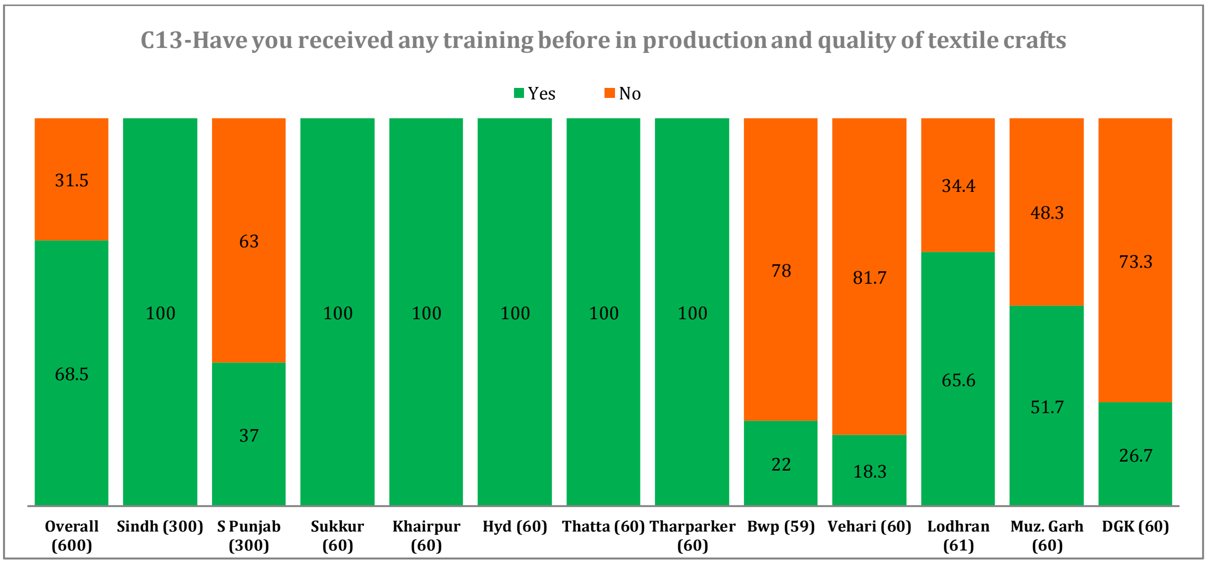


Figure 25

Overall, 68.5 per cent of the respondents said that they have received prior training in production of quality textile crafts. All 300 respondents from Sindh answered 'Yes', as compared to only 37 per cent of respondents from South Punjab. Lodhran and Muzaffargarh had the highest percentages of trained respondents among all the cities of South Punjab, at 65.6 per cent and 51.7 per cent respectively. Vehari (81.7 per cent) and Bahawalpur (78 per cent) had the greatest percentages of untrained respondents.

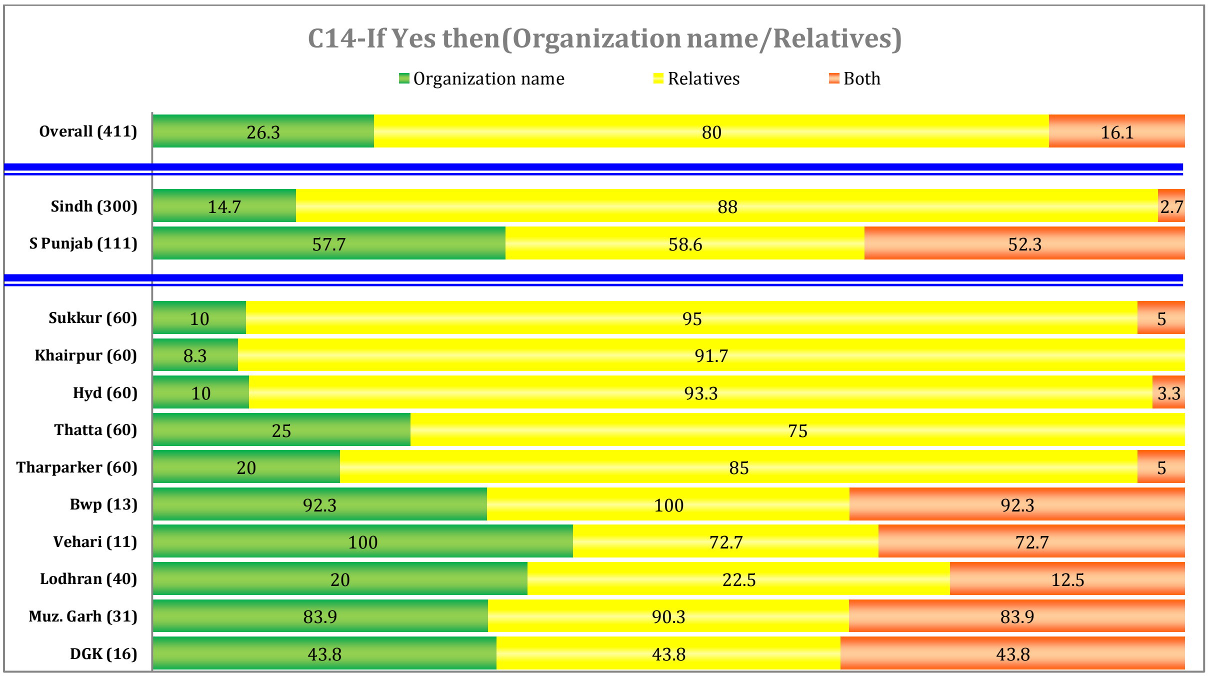


Figure 26

Overall 411 respondents have received prior training. Out of these, 26.3 per cent were trained by an organization (14.7 per cent in Sindh and 57.7 per cent in South Punjab); 80 per cent were trained by their relatives (88 per cent Sindh, 58.6 per cent South Punjab) and 16.1 per cent received training from both (2.7 per cent Sindh, 52.3 per cent South Punjab).

Among the cities of Sindh, the relatives of the respondents were the main trainers. In Sukkur 95 per cent of the respondents received training from their relatives. The highest percentage of respondents who were trained by an organization was recorded in Thatta (25 per cent). Among the respondents from South Punjab, 100 per cent from Vehari have received training from an organization, while 100 per cent of the interviewees have been trained by a relative in Bahawalpur. The greatest number of 'Both' responses was recorded in Bahawalpur.

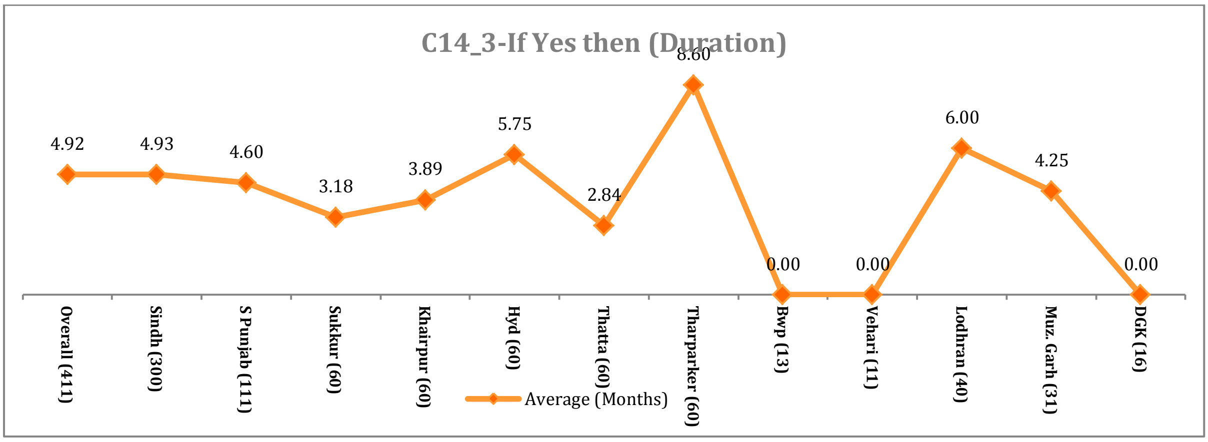


Figure 27

Of the 411 respondents who had received some training, overall the duration of that training was 4.92 months. The average durations for Sindh and South Punjab are 4.93 months and 4.60 months respectively. Among the cities of Sindh, respondents from Tharparker were trained for the longest period of time i.e. 8.60 months, followed by Hyderabad (5.75 months). The respondents from Thatta had received training for the shortest duration i.e. 2.84 months. Among the cities of South Punjab, the interviewees from Lodhran were trained for the longest time (i.e. 6 months), followed by Muzaffargarh (4.25 months).

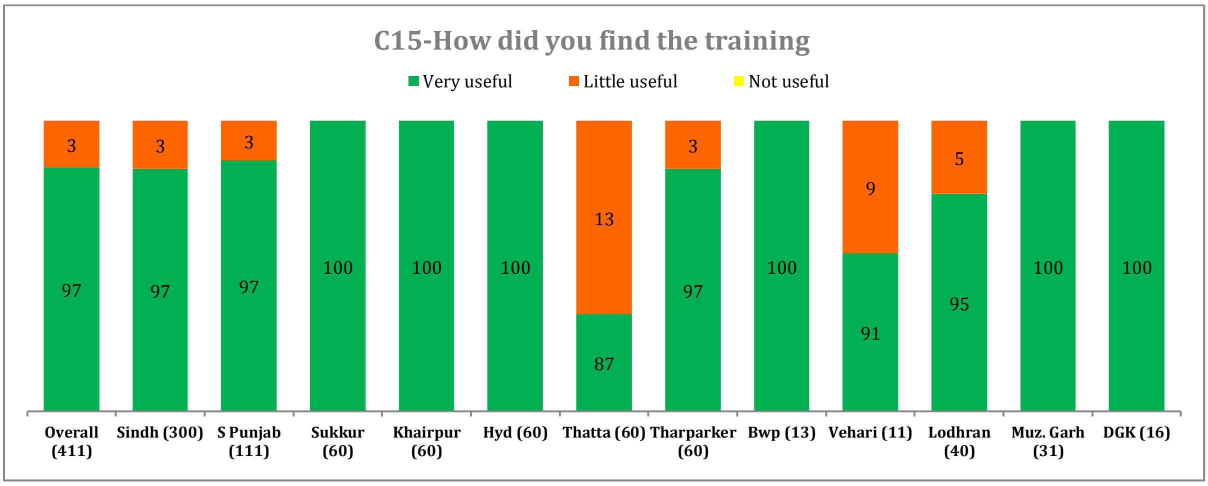


Figure 28

Overall, the trained respondents were satisfied with their training, as 97 per cent found it very useful and only 3 per cent found it of little use. These numbers remain consistent in the provincial findings. All of the respondents from the cities of Sukkur, Khairpur, Hyderabad, Bahawalpur, Muzaffargarh, and DGK called the training 'very useful'. The highest percentage of respondents who did not find the training very useful was recorded in Thatta (13 per cent). A notable 9 per cent of the respondents of Vehari called it 'only a little useful'.

Designing & Finishing

Designing and finishing textile crafts is as important as production itself. Knowing market trend allows artisans to produce items that sell well in the market. This chapter therefore documents findings on the designing and finishing of textile crafts in Sindh and South Punjab, such as: Sources of fashion information; how designs are traced for production; and steps in packaging

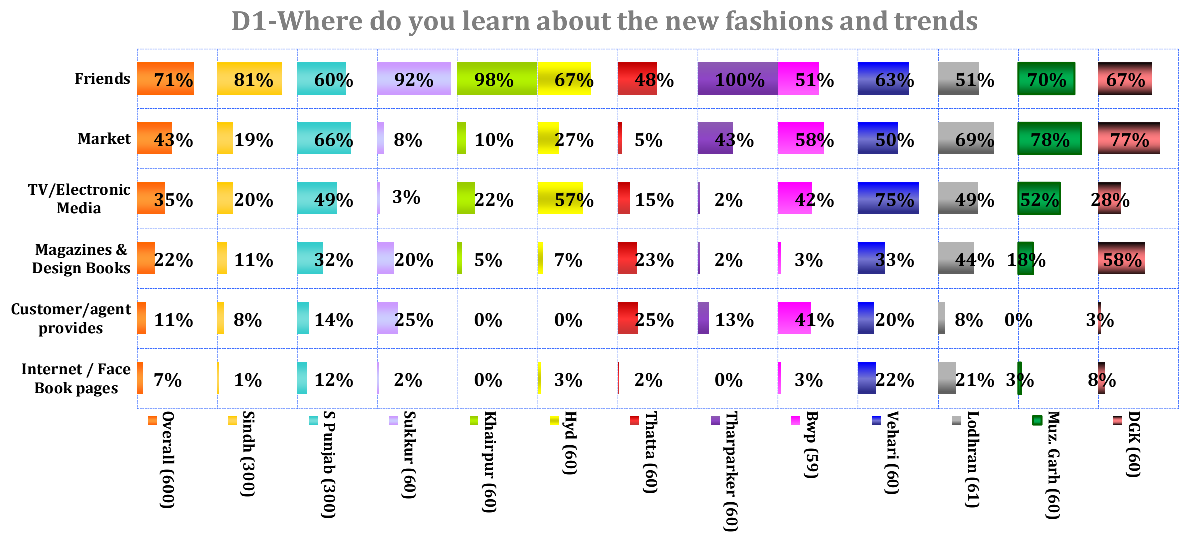


Figure 29

A total of 600 respondents were asked where they learn about the new fashion and trends. 71 per cent replied “friends”; 43 per cent replied “the market”; 35 per cent replied “TV or media” and 22 per cent said “magazines and design books”. 11per cent said “customer / agent provides this” and 7 per cent replied “Internet/ Face Book pages”.

81 per cent of the respondents from Sindh and 60 per cent from South Punjab replied “friends”. 19 per cent from Sindh and 66 per cent from South Punjab replied “the market”. 20 per cent from Sindh and 49 per cent from South Punjab replied “TV/ electronic media”. 11 per cent from Sindh and 32 per cent from South Punjab said “magazines and design books”. Eight per cent from Sindh and 14 per cent from South Punjab said “customer/ agent provides” design information and one per cent from Sindh and 12 per cent from South Punjab said “Internet/ Face Book pages”.

In Sindh 92 per cent of respondents from Sukkur, 98 per cent from Khairpur, 67 per cent from Hyderabad, 48 per cent from Thatta and a resounding 100 per cent from Tharparker said “friends”. 27 per cent from Hyderabad and 43 per cent from Tharparker replied “the market”. 22 per cent from Khairpur, 57 per cent from Hyderabad and 15 per cent from Thatta replied “TV/ electronic media”. 23per cent from Thatta replied “magazines and design books”. From both, Sukkur and Thatta, 25per cent said “customer/ agent provides” and 2per cent said “internet/ Face Book pages”

In South Punjab, 51per cent of the respondents from Bahawalpur and Lodhran, 63per cent from Vehari, 70per cent from Muzaffargarh and 67per cent from DGK said “friends”. 58per cent from Bahawalpur, 50per cent from Vehari, 69per cent from Lodhran, 78per cent from Muzaffargarh and 77per cent from DGK said “market”. 42per cent from Bahawalpur, 75per cent from Vehari, 49per cent from Lodhran, 52per cent from Muzaffargarh and 28per cent from DGK said “TV/ electronic media”. 33per cent from Vehari, 44per cent from Lodhran, 18per cent from Muzaffargarh and 58per cent from DGK replied “magazines/ design books”. 41per cent of respondents from Bahawalpur and 20per cent from Vehari said “customer/ agent provides”. 22per cent from Vehari and 21per cent from Lodhran replied “internet/ Face Book pages”.

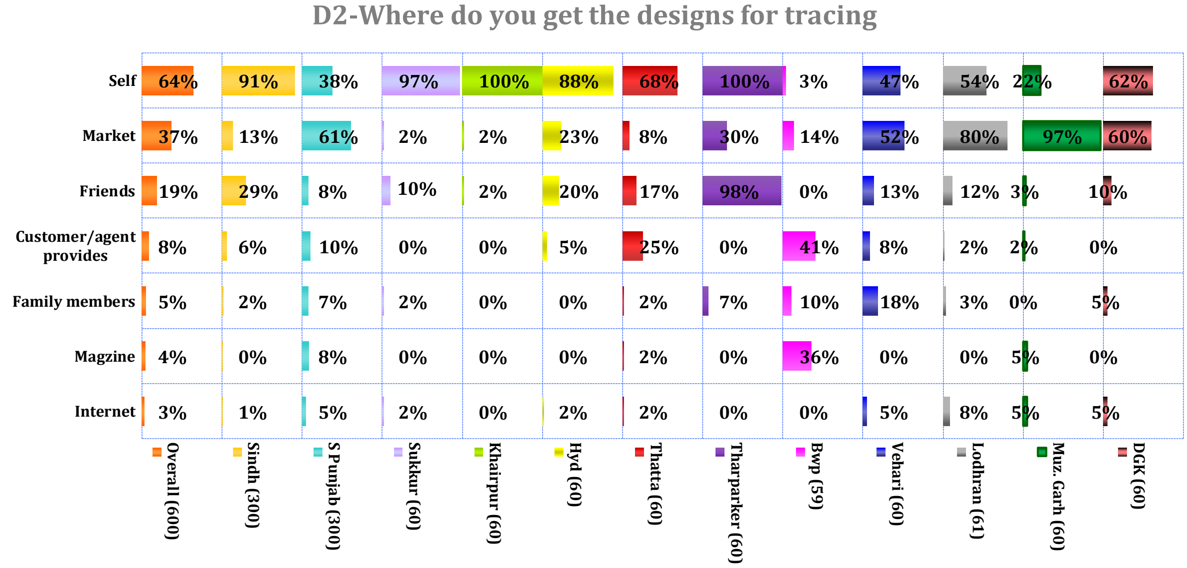


Figure 30

Out of 600 respondents who were asked where they get the designs for tracing, 64 per cent replied “self-designed”, 37 per cent replied “from the market”; 19 per cent replied “friends”, 8 per cent said “customer/agent provides”; 5 per cent said “ family member” had given them ideas. Four per cent said “magazines” and 3 per cent indicated the internet.

91per cent of respondents from Sindh and 38per cent from South Punjab replied “self”, 13per cent from Sindh and 61per cent from South Punjab replied “market”, 29per cent from Sindh and 8per cent from South Punjab said “friends”, 6per cent from Sindh and 10per cent from South Punjab said “customer/agent provides”, 2per cent from Sindh and 7per cent from South Punjab replied “family members”, 8per cent from South Punjab replied “magazine” and 1per cent from Sindh and 5per cent from South Punjab replied “ internet”.

In Sindh, 97per cent of respondents from Sukker, 88per cent from Hyderabad and 68per cent from Thatta replied “self” while in Khairpur and Tharparker, all of the responds said that they find the designs themselves. 23per cent from Hyderabad and 30per cent from Tharparker said “market”. 10per cent from Sukker, 20per cent from Hyderabad and 17per cent from Thatta replied “friends”. Whereas, in Tharparker, the rate was much higher with 98per cent of respondents replying “friends”. 25per cent of respondents from Thatta replied “customer/agent provides”.

In South Punjab, 47per cent of respondents from Vehari, 54per cent from Lodhran, 22per cent from Muzaffargarh and 62per cent from DGK replied “self”. 14 per cent from Bahawalpur. 52per cent from Vehari, 80per cent from Lodhran, 97per cent from Muzaffargarh and 60per cent from

DGK replied "market". 13per cent from Vehari, 12per cent from Lodhran and 10per cent from DGK replied "friends".

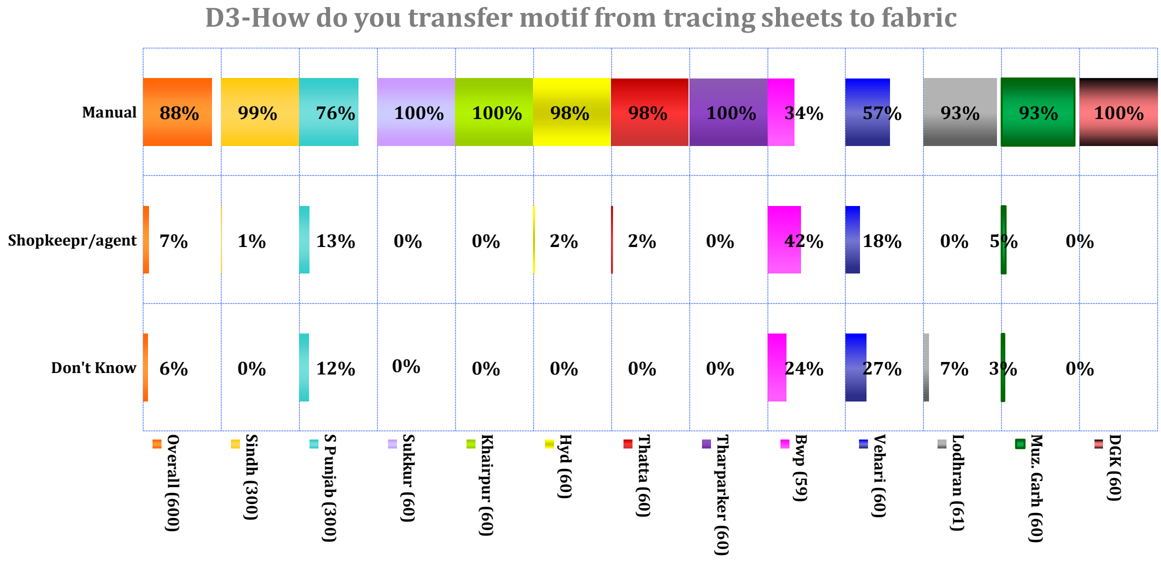


Figure 31

Out of a total of 600 respondents who were asked how they transferred motifs from tracing sheets to paper, 88 per cent responded by saying that they do it themselves, 7 per cent said a shopkeeper or agent does it for them and 6 per cent replied that they did not know.

Out of 300 people from Sindh, 99per cent said that they do it manually while the remaining 1per cent said through agents or shopkeepers. Out of 300 people in South Punjab, 76 per cent do it manually and 13 per cent have it done by shopkeepers and agents.

In Sindh, almost all of the respondents replied "manual" (100per cent in Sukkur, Khairpur and Tharparker and 98per cent in Hyderabad and Thatta). Same is the case in South Punjab where respondents from Vahera, Lodhran, Muzaffargarh and DGK mostly use the manual method. Bahawalpur is the only city where people most commonly do it through shopkeepers and agents (a rate of 42per cent).

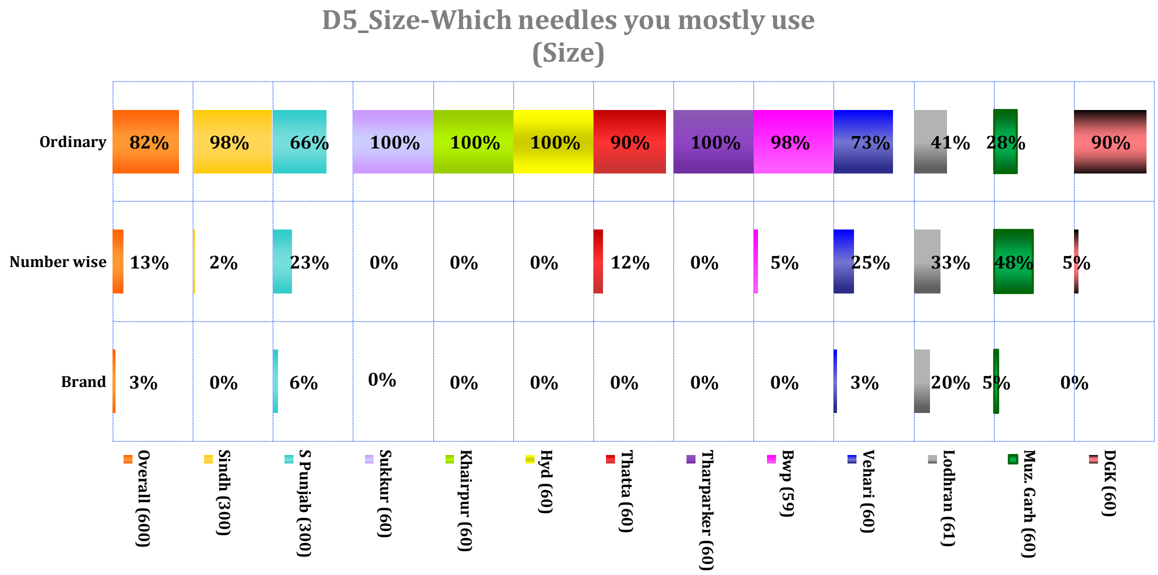


Figure 32

A total of 600 respondents were asked which needles they mostly use in their work. 82 per cent responded that they use ordinary needles, 13 per cent said that they use number wise and 3 per cent responded that they use branded needles.

Out of 300 respondents from Sindh, 98 per cent said that they use ordinary needles and the remaining 2 per cent responded that they use number wise. Out of 300 respondents from South Punjab, 66 per cent said that they use ordinary needles, 23 per cent said “number wise” and 6per cent responded by saying that they use branded needles.

In Sindh, almost all the respondents responded that they use ordinary needles (100 per cent in Sukkur, Khairpur, Hyderabad and Tharparker) but in Thatta, 90 per cent of the respondents' response was that they use ordinary needles while 12 per cent responded that they use number wise. In South Punjab, the response of most of the respondents was that they use ordinary needles (98 per cent in Bahawalpur, 90 per cent in DGK and 73 per cent in Vehari) however, in Muzaffargarh 48 per cent of the respondents replied that they use needles number wise.

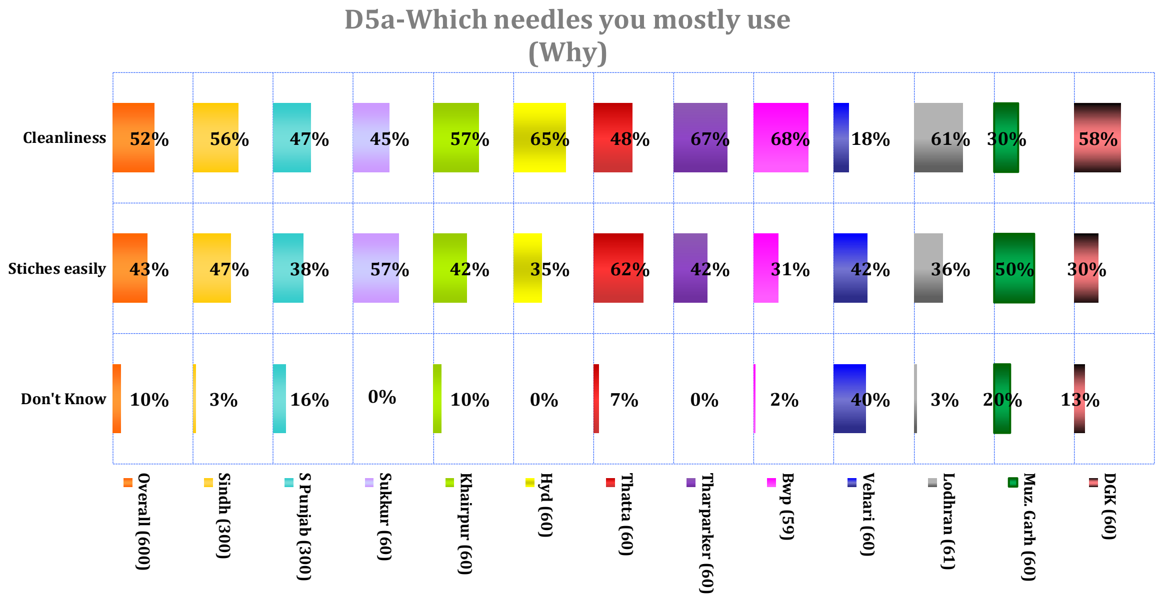


Figure 33

When 600 respondents were asked the reason for using the type of needle which they use, 52 per cent said "cleanliness", 43 per cent said "stitches easily" and 10 per cent responded that they don't know.

In Sindh, 56 per cent of 300 respondents said "cleanliness", 47 per cent said "stitches easily" and 3 per cent replied that they don't know. In South Punjab, out of 300 respondents, 47 per cent responded that their reason was "cleanliness", 38 per cent said that their reason was "stitches easily" and 16 per cent that they didn't know.

In Sindh, 57 per cent of respondents from Khairpur, 65 per cent from Hyderabad and 67 per cent from Tharparker replied that their reason was cleanliness. 57 per cent of respondents from Sukkur and 52 per cent from Thatta said that their reason was that the needle stitches easily. 10 per cent from Khairpur said that they did not know.

In South Punjab, 68 per cent from Bahawalpur, 61 per cent from Lodhran and 58 per cent from DGK responded that their reason was cleanliness. 42 per cent from Vehari, 36 per cent from Lodhran and 50 per cent from DGK responded that their reason was "stitches easily". A fair amount of people responded that they did not know (40 per cent from Vehari and 20 per cent from Muzaffargarh)

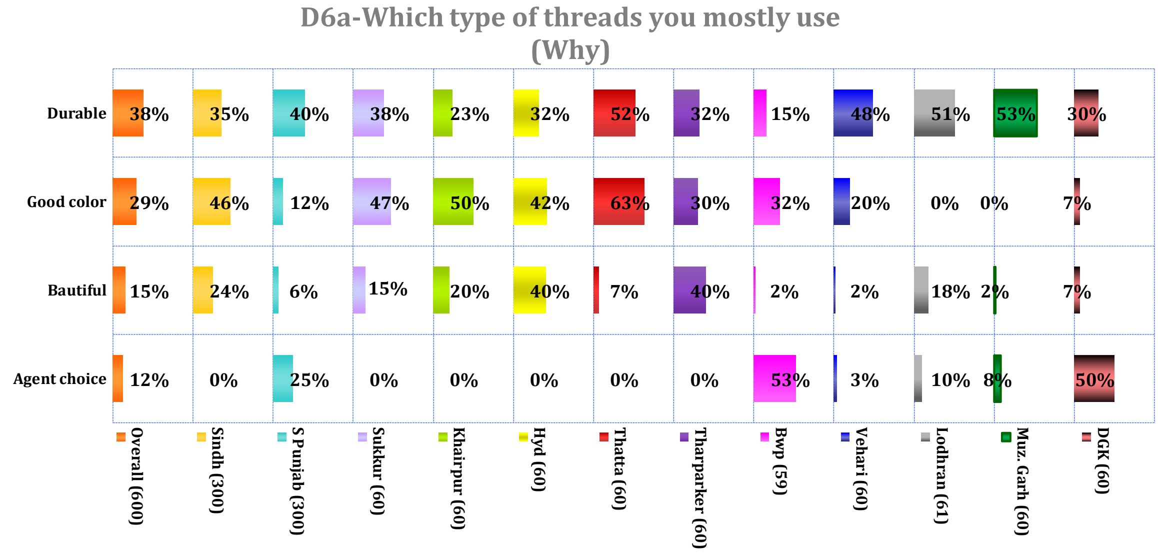


Figure 34

Upon being asked why they use their preferred type of thread, 38 per cent of the 600 respondents said that their reason was durability, 29 per cent replied “good color”, 15 per cent replied that it depended on the beauty of the thread and 12 per cent said “agent choice”.

In Sindh 35 per cent said “durable”, 46 per cent said “good color”, 24 per cent said “beautiful” and 0per cent said “agent choice”. In South Punjab, 40 per cent said “durable”, 12 per cent replied “good color”, 6 per cent replied “beautiful” and 25 per cent said “agent choice”.

In Sindh, most of the respondents’ reason was “good color”; 47 per cent in Sukkur, 50 per cent in Khairpur, 42 per cent in Hyderabad and 63 per cent in Thatta. In Tharparker, however, the main reason was the beauty of the thread as per the response of 40 per cent of the respondents. 52 per cent of the respondents in Thatta, 38 per cent of the respondents in Sukkur and 32 per cent of the respondents in Hyderabad and Tharparker responded that their reason was the durability of the thread. 15 per cent of the respondents in Sukkur and 40 per cent of the respondents in Hyderabad and Tharparker said that their reason was the beauty of the thread. None of the respondents from Sindh responded with “agent choice”.

In South Punjab, most of the respondents from Vehari (48 per cent), Lodhran (51 per cent) and Muzaffargarh (53 per cent) responded with “durable”. 32 per cent from Bahawalpur and 20 per cent from Vehari responded with “good color”. Most of the respondents from Bahawalpur (53 per cent) and DGK (50 per cent) responded with “agent choice”.

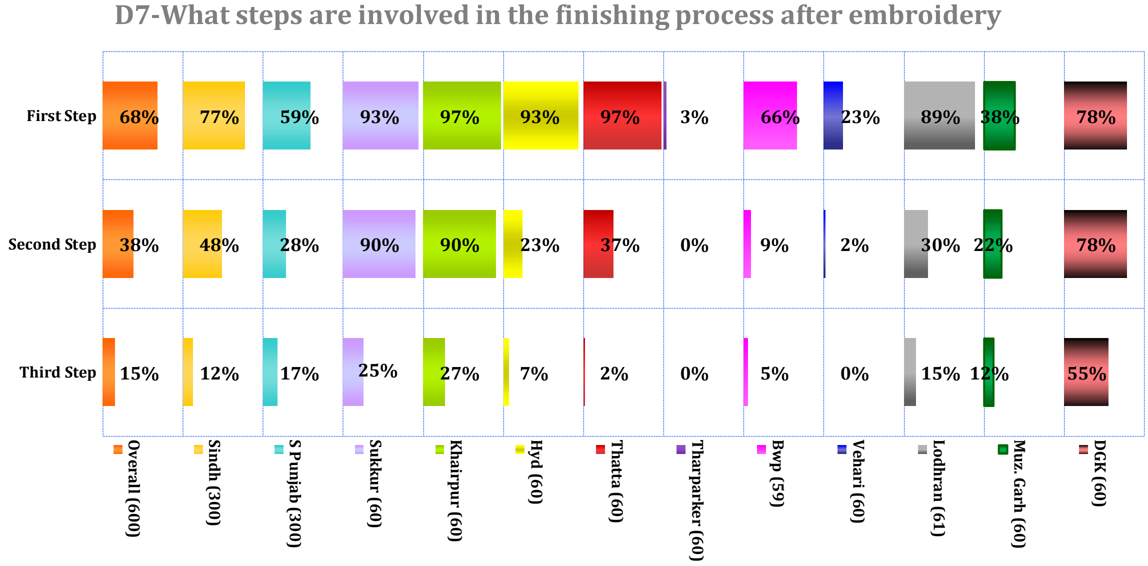


Figure 35

A total of 600 respondents were asked about the steps in the finishing process after the embroidery. 68 per cent replied "first step", 38 per cent replied "second step" and 15per cent replied "third step". In Sindh, 77 per cent of the respondents said "first step", 48 per cent said "second step" and 12 per cent said "third step". In South Punjab, 59 per cent of the 300 respondents said "first step", 28 per cent said "second step" and 17 per cent said "third step".

In Sindh, 97 per cent of respondents from Khairpur and Thatta and 93 per cent from Hyderabad and Sukkur replied "first step". In Tharparker only 3 per cent of people said "first step".90 per cent of people from Sukkur and Khairpur said "second step". 25 per cent from Sukkur and 27 per cent from Khairpur replied "third step". In South Punjab 66 per cent of respondents from Sukkur, 89 per cent from Lodhran and 78per cent from DGK replied with "first step". 78 per cent of respondents from DGK and 30 per cent from Lodhran said "second step". 15 per cent from Lodhran and 55 per cent from DGK replied with "third step".

After the production maximum three more steps are required to get to the ready-to-sell finishing stage of all textile products.

Selling, Marketing and Forward Linkages

Selling is the moment of truth for any business. And so it is for textile artisans. Timely sales of crafts produced recover costs and generates incomes for the artisans. Hence forward linkages occupy an important place in the value chain of crafts marketing. This chapter presents baseline findings on selling, marketing and forward linkages of textile artisans in Sindh and South Punjab. Findings are presented on:

- Who sells the product in the market?
- What is are current and expected prices of the textile products produced?
- What difficulties are faced in sales and marketing?
- How these challenges can be addressed?

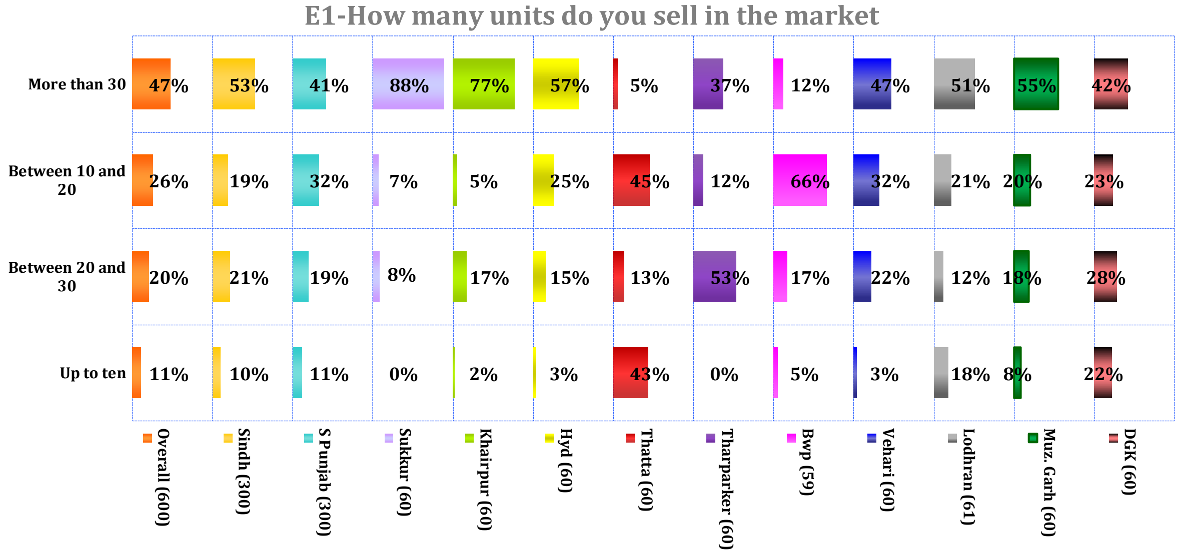


Figure 36

Overall 47 per cent respondents say that they sell more than 30 units per month in the market. 53 per cent artisans of Sindh and 41 per cent artisans on South Punjab sell more than 30 units the market. It means that more crafts are sold in markets in Sindh as compared to South Punjab. In Sindh, 88 per cent artisans belong to Sukkur, who sell more than 30 units in the market and the 77 per cent artisans of Khairpur are close to the artisans of Sukkur. Amazingly, 45 per cent and 43 per cent artisans of Thatta sell between 10-20 units and 1-10 units respectively in the markets which is lowest in Sindh. In Tharparkar, 53 per cent, artisan sell crafts between 20-30 units.

In South Punjab, maximum artisans, 55 per cent and 51 per cent in Muzzafargarh and Lodhran respectively sell more than 30 units in the market and 12 per cent artisans in Bahawalpur which is lowest value sell their products in markets but they sell mostly between 10-20 units.

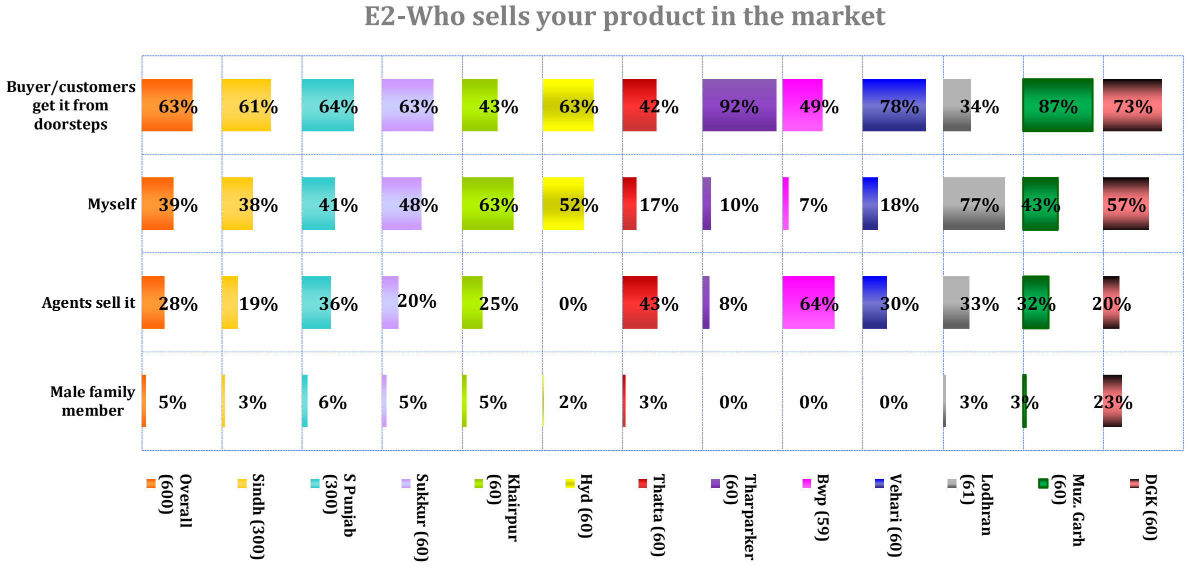
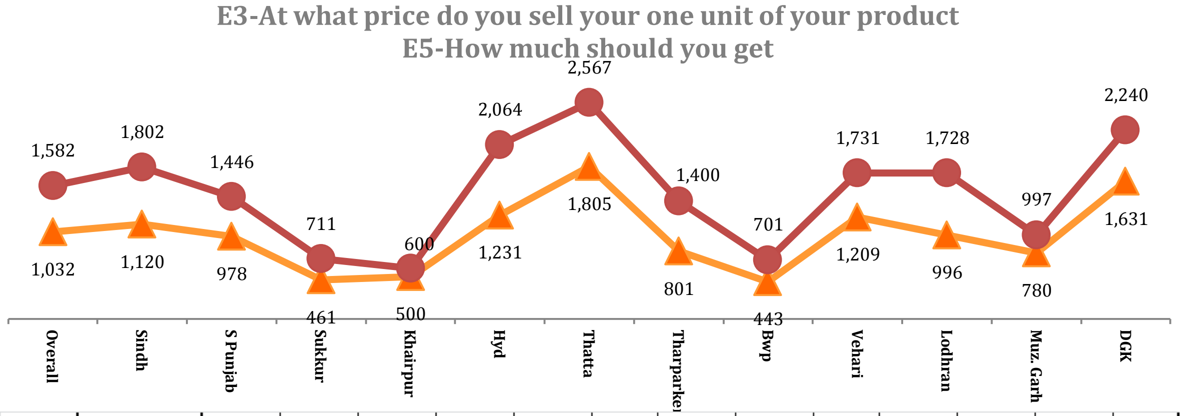


Figure 37

Overall, 63 percent of artisans (61 per cent in Sindh and 64 per cent in SP) say that buyers and customers buy their crafts from the artisan's homes. Moreover, in South Punjab and Sindh, 64 per cent and 61 artisans sell their crafts at their house. In Sindh, maximum artisans, 92 per cent artisans of Tharparkar say that customers buy their crafts at house and 63 per cent artisans of Sukkur and Hyderabad say that they sell their product at their house. Interestingly, in Hyderabad, agents do not buy the crafts from artisan house and only 2 percent family members are involved to sell the crafts. In Khairpur, 63 per cent artisans sell their crafts themselves. The involvement of agents in selling is maximum in Thatta at 43 per cent and minimum in Hyderabad. The involvement of family members in selling is very low which not more than 6 per cent is in each districts of Sindh.

In Punjab, maximum, 87 percent selling is held in Muzaffargarh and minimum 43 per cent is held in Lodhran. Similarly, maximum 77 per cent and minimum 7 per cent artisans in Lodhran and Bahawalpur respectively sell their products themselves. Maximum 64 per cent agents buy products from artisans in Bahawalpur and minimum 20 per cent agents in DGK do so. No role of family members in selling is seen in Bahawalpur and Vehari districts.



Base:	Current Price (E3)	Overall (282)	Sindh (108)	S Punjab (174)	Sukkur (9)	Khairpur (1)	Hyd (39)	Thatta (21)	Tharparker (38)	Bwp (42)	Vehari (32)	Lodhran (39)	Muz. Garh (30)	DGK (31)
	Expected Price (E5)	Overall (282)	Sindh (108)	S Punjab (174)	Sukkur (9)	Khairpur (1)	Hyd (39)	Thatta (21)	Tharparker (38)	Bwp (42)	Vehari (32)	Lodhran (39)	Muz. Garh (30)	DGK (31)

Figure 38

This graph combines two data sets: a) actual estimated price at which artisans sell one unit of their product and b) an expected hypothetical price that they should get for the same unit in the market. Difference between the two prices indicates perceived level of exploitation of the artisans. Overall there is a difference of PKR 550 between actual and expected price. The difference in Sindh is PRK 680 whereas in South Punjab it is 468, which indicates a higher sense of exploitation is perceived by artisans in in Sindh as compared to those in South Punjab. Least difference of PKR 100 is found in Khairpur in Sindh followed by Muzafargarh (PKR 217) in South Punjab.

Figure 39

Overall 53 per cent artisans are found getting fair price of their product, with which they are satisfied. The satisfaction level in Sindh, is 64 percent and in South Punjab is 42 per cent. It means artisans the level of getting fair price is higher in Sindh that in South Punjab. Moreover, in Sindh, maximum 98.3 per cent artisans of Khairpur are getting fair price and minimum 35 per cent artisans of Hyderabad are doing it.

In South Punjab, the maximum level is 50 per cent and minimum is 28.8 per cent are seen in Muzaffargarh and Bahawalpur.

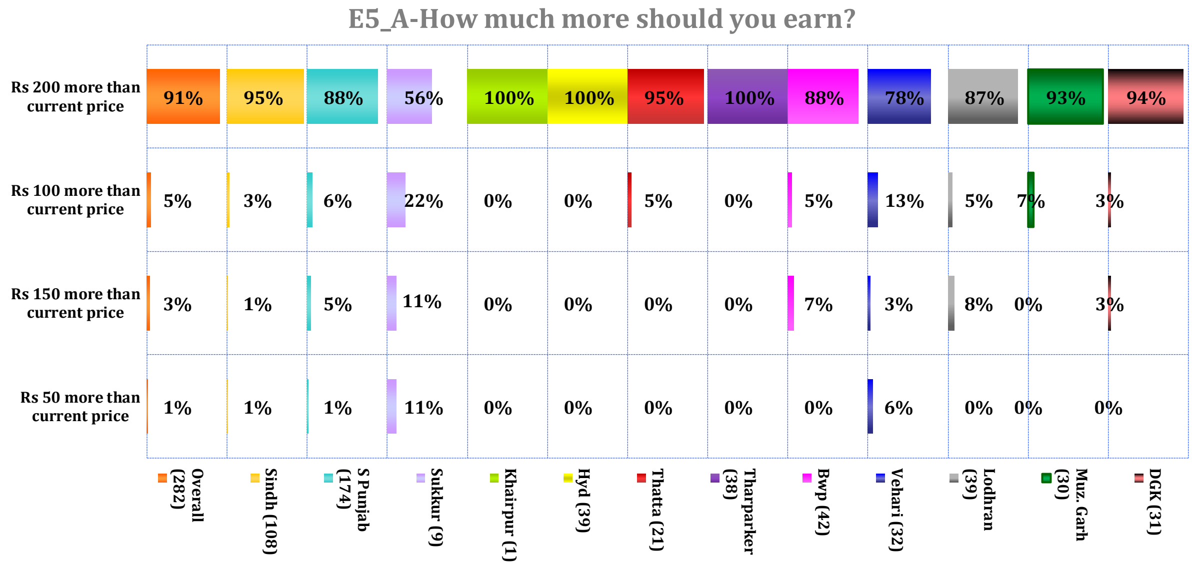


Figure 40

Most of the respondents say that PKR 200 more than current price should be the price of their product. The opinion of respondents is across provinces and all districts. In Sindh, 22 per cent respondents of Sukkur say that it should be PKR 150 more than the current price.

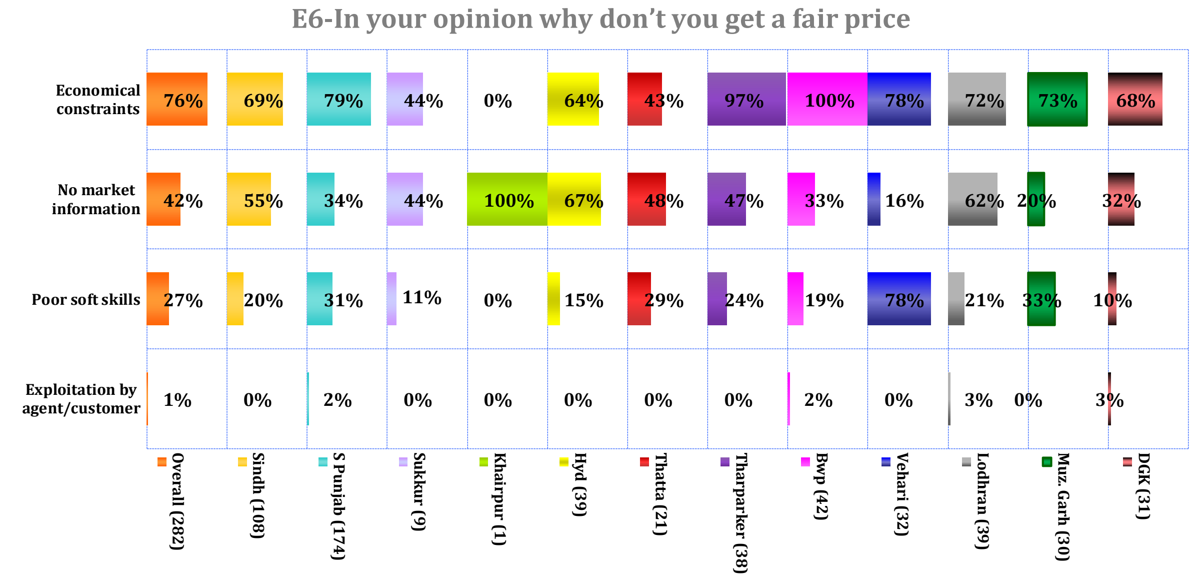


Figure 41

Overall 76 percent economic constraints[8], 42 per cent no information about market and 27 per cent poor soft skills[9] are major causes of not getting fair price. In Sindh, the value is 69 per cent and in South Punjab, it is 79 per cent. Moreover, exploitation by agent is not seen in Sindh and in

[8] Such as immediate need for cash, debt repayment, balancing household budget
[9] Identified by respondents themselves as weak negotiation and bargaining skills, inability to speak confidently with buyers, customers and agents

South Punjab its value is 2 per cent. In Khairpur district, 100 per cent artisan think that they do not have information about market and they have not shown any concerns(0 per cent) about economic constraints. 100 percent artisans of Bahawalpur consider economic constraints as major reason for not getting fair price and 78 per cent artisans of Vehari think poor soft skills are the major reason for it.

Exploitation by agent is not seen in Sukkur, Khairpur, Hyderabad, Thatta, Tharparkar, Vehari and Muzaffar Garh and other districts the reason is found very little.

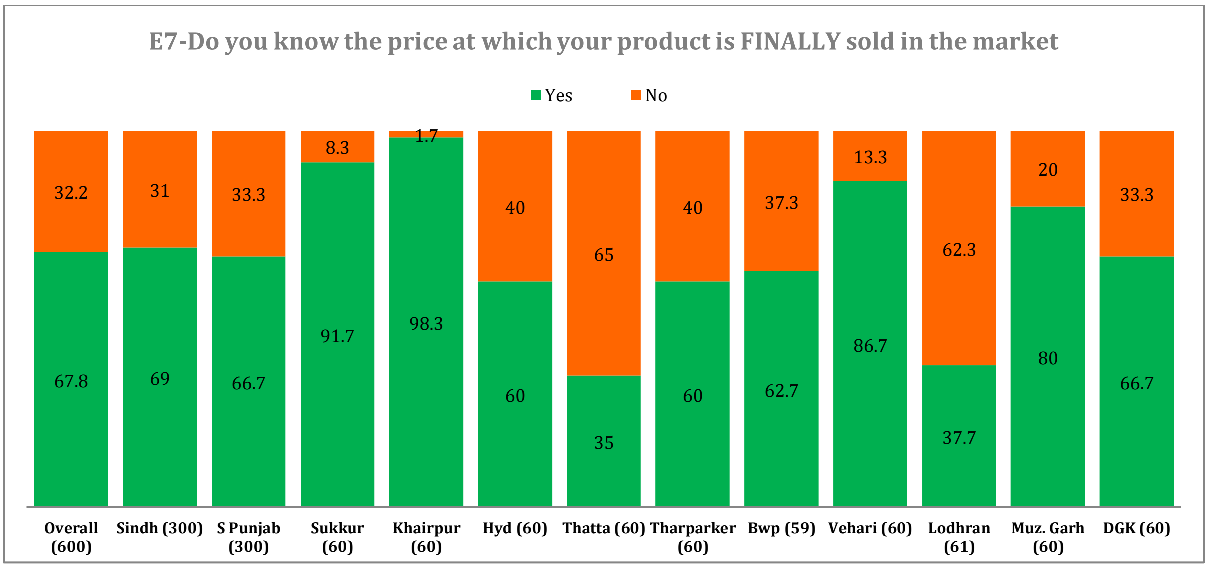


Figure 42

Overall level of information about final price of product is 68 per cent and in Sindh and South Punjab, it is 69 percent and 67 per cent respectively. Moreover, in Sindh, the maximum level of price awareness, 98 per cent, is seen in Khairpur and minimum level, 35 per cent is seen in Thatta. In South Punjab, the maximum level is 87 per cent and minimum 38 per cent are seen in Vehari and in Lodhran respectively.

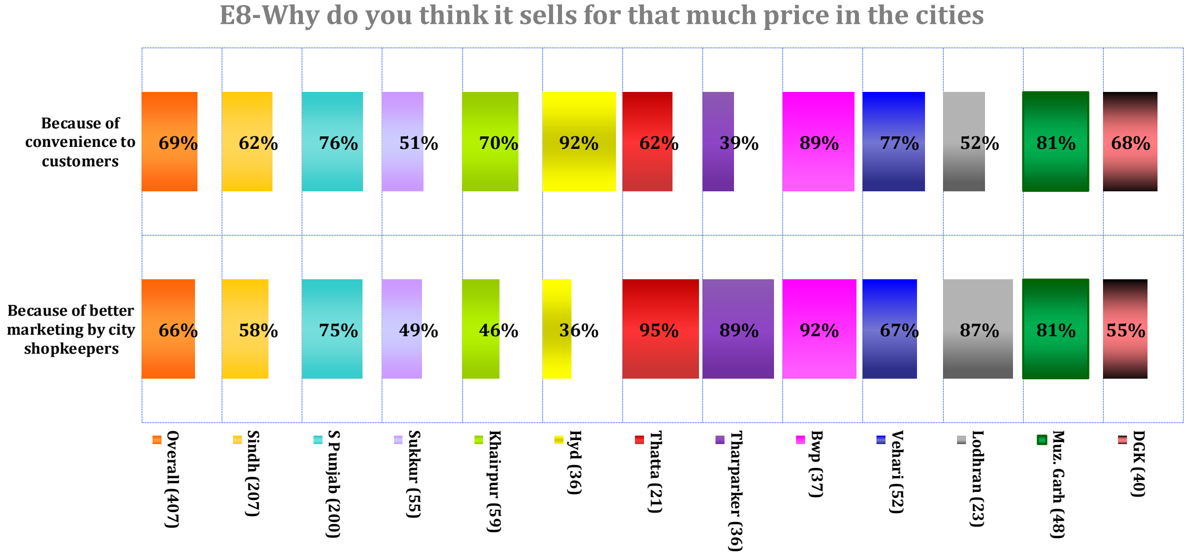


Figure 43

Overall 69 per cent and 66 per cent artisans think that products are sold at much price in cities are because of convenience to customers and better marketing by shopkeeper respectively. In South Punjab, the value is 76 per cent and in Sindh, it is 62 per cent. Moreover, 92 artisans of Hyderabad consider convenience to customers as major reason and 95 percent artisans in Thatta think better marketing by shopkeepers as major reason of it.

In South Punjab, 92 and 89 per cent artisan in Bahawalpur say that convenience to customers and better marketing by shopkeeper respectively are main reasons for it.

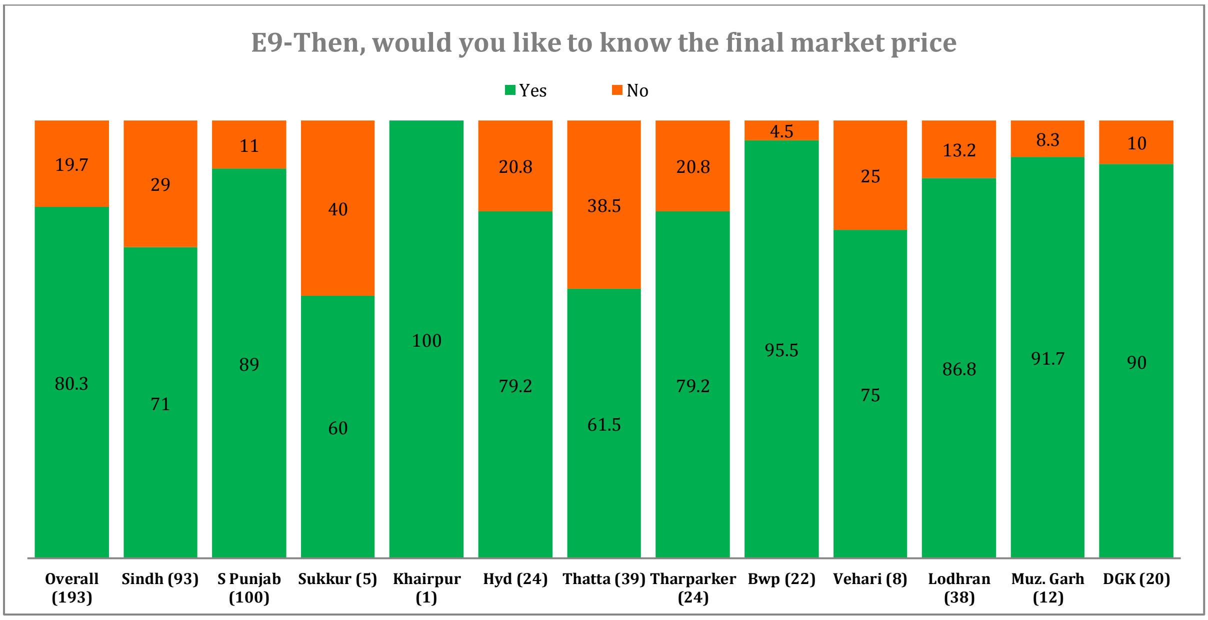


Figure 44

Overall 80 per cent and 89 per cent in South Punjab and 71 per cent in Sindh artisans want to know the final market price. In Sindh and South Punjab, 100 artisans of Khairpur and 96 per cent artisans of Bahawalpur would like to know the final market price.

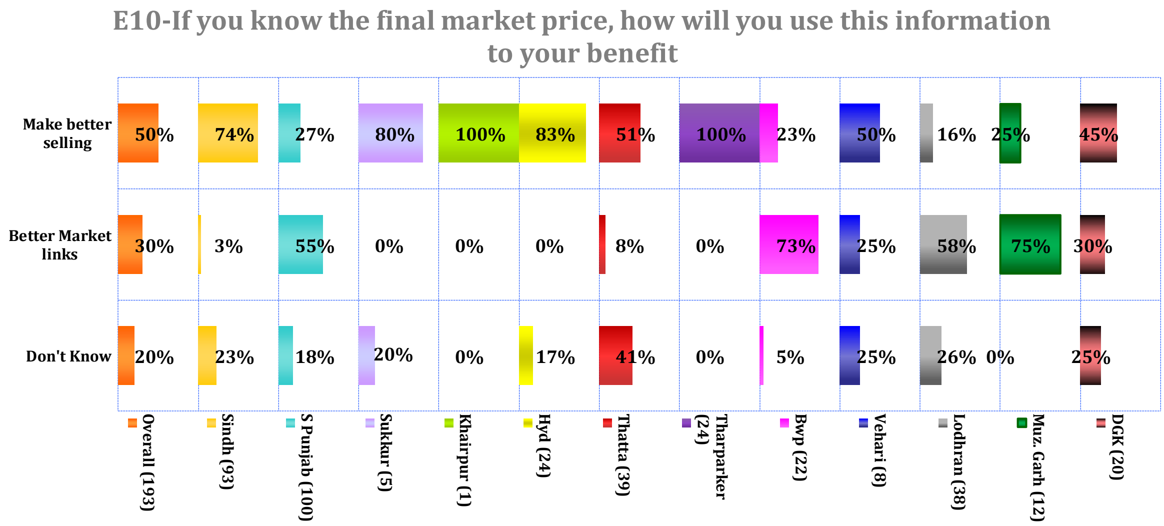


Figure 45

Overall 50 per cent respondents think the use of information will help them in getting better selling price, 30 per cent will use it for better market links. 74 per cent artisans of Sindh will use the information for better selling and 55 per cent of South Punjab will use it for better links. In Sindh, 100 per cent artisans of Khairpur and Tharparkar will use for better selling. But better market links is found little useful for artisans of Sindh. In Punjab, 75 per cent artisans will use information for better market links and 16 per cent artisans of Lodhran find information useful for better selling.

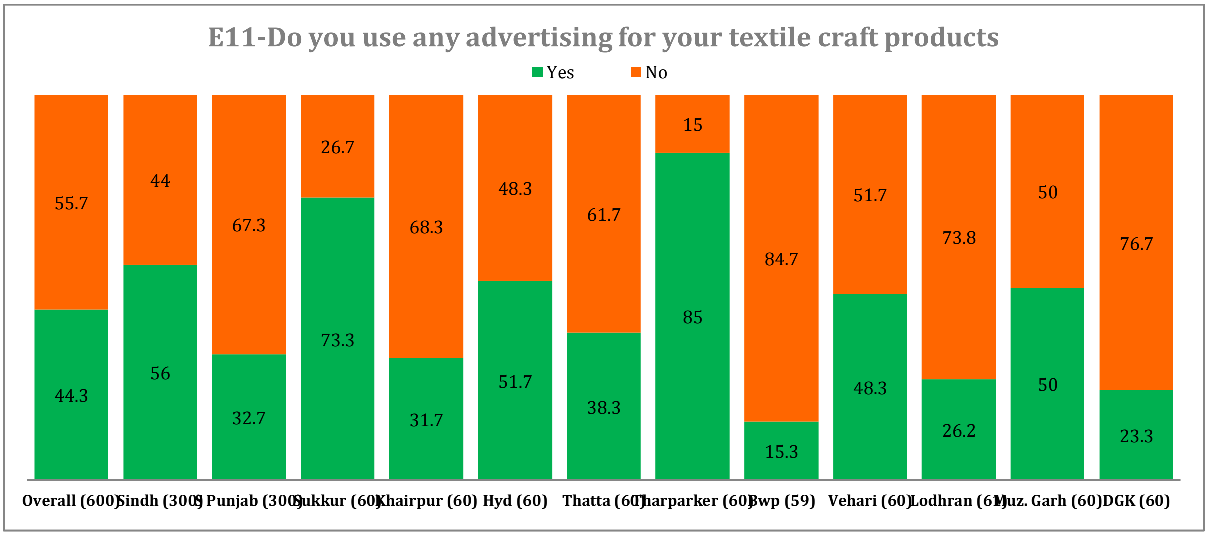


Figure 46

Overall 44 per cent artisans use advertising. 33 per cent and 56 per cent artisans of South Punjab and Sindh depend on advertising. In Sindh, 85 per 73 per cent artisans of Tharparkar and Sukkur use advertising. However, in districts of South Punjab, not more than 50 per cent of artisans use advertising. In Bahawalpur, the value is lowest, 15 per cent among all districts of provinces.

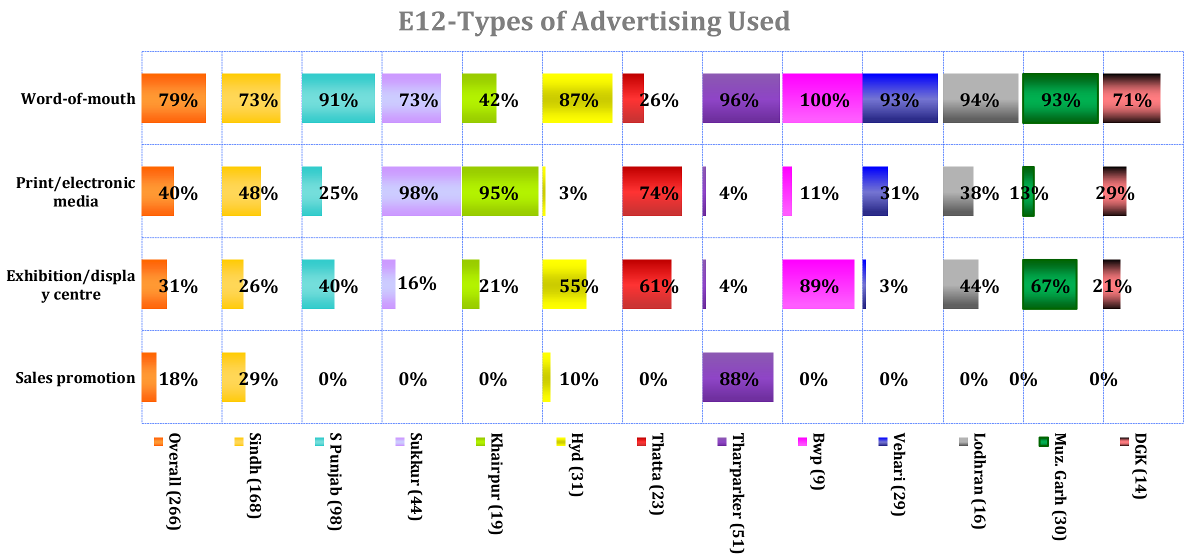


Figure 47

Overall respondents use 79 per cent word of mouth advertising, 40 per cent on print/electronic media (newspapers, brochures, pamphlets, banners, advertisement on cables etc.), and 31 per cent are involved in exhibition/display centres. At provincial level, in South Punjab 91 per cent artisans verbally advertise and 40 per cent use exhibition/display centre and in Sindh, 73 per cent verbally advertise their products and 48 per cent uses print/electronic media. Sales promotion techniques are not much adopted by the artisans of both provinces.

In Sindh, 96 per cent artisans of Tharparkar advertise their product by word of mouth but very interestingly 88 per cent artisan of same district also use sales promotion techniques for advertising their products. In Sukkur, 98 per cent artisans and 95 per cent artisans in Khairpur use print/electronic media.

In South Punjab, 100 word of mouth advertising and 89 per cent exhibition/display centre advertising are seen in Bahawalpur. Mostly artisans use word of mouth technique for their product advertisement. In Lodhran, 94 per cent, and 93 per cent artisans of Vehari and 93 per cent artisans of Muzaffargarh also do so. In Muzaffargarh, 67 per cent depend on exhibition/display centres. So, most of artisans of districts, except Tharparkar, focus least on sales promotion techniques. In Sindh as compare to South Punjab, artisans do not use exhibition techniques for advertisement.

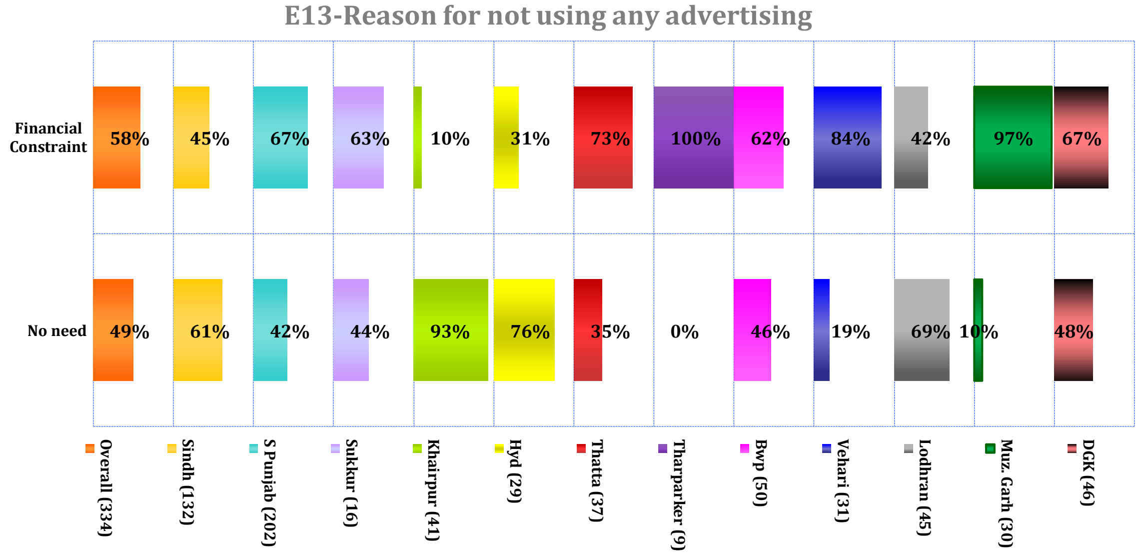


Figure 48

Overall 58 per cent artisans say that financial constraints are major problems for not using advertising but 49 per cent artisans think that they do not need any advertising. At provincial level, in Sindh, 61 artisans say they do not need advertising and 45per cent say they do not have money for advertisement. In South Punjab, 67artisans say that financial constraints and 61 per cent think they do not need any advertising. Among Sindh districts, the maximum, 100 per cent, 73 per cent and 63 per cent artisans of Tharparkar, Thatta and Sukkur respectively think they do not have money for advertising. 93 per cent, 76 per cent, and 44 per cent artisans of Khairpur, Hyderabad and Sukkur respectively think they do not need any advertisement. In South Punjab, financial constraints have been found 97 per cent, 84 per cent and 62 per cent artisans of Muzaffargarh, Vehari and in Bahawalpur and DG Khan respectively face financial constraints for advertising. Moreover, 69 per cent, 48 per cent and 46 per cent artisans of Lodhran, DG Khan and Bahawalpur respectively say that they do not need any advertising.

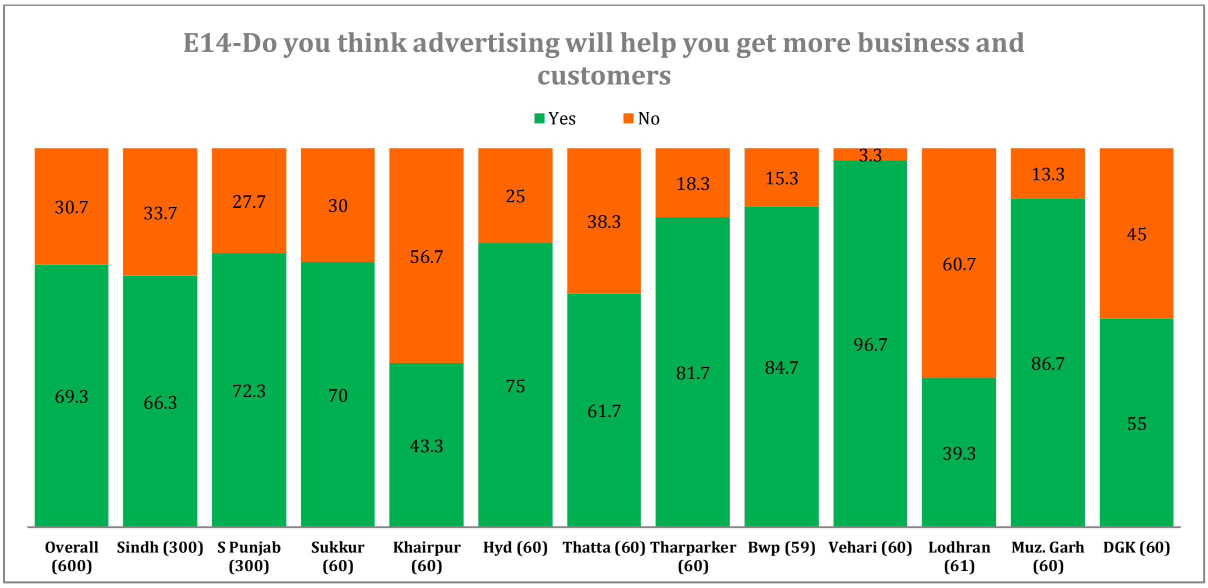


Figure 49

Overall 69 respondents think that advertising will help them get more business and customers. The respondents of South Punjab (72 per cent) are at higher level as compare to the respondents of Sindh (66 per cent) which means that respondents of South Punjab are more hopeful about role of advertising than respondents of Sindh. But the comparison does not reveal any significant difference. 97 percent respondents of Vehari and 75 per cent of Hyderabad think that advertising will help them get more business and customers.

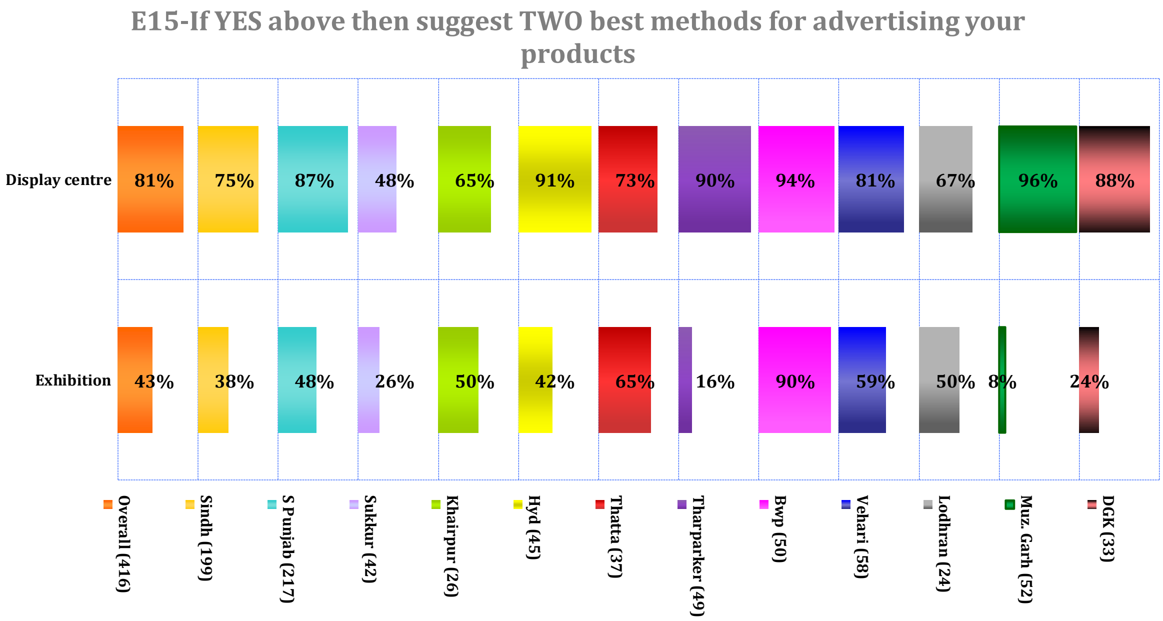


Figure 50

Overall 81 per cent respondents suggest display centre and 43 per cent suggest exhibition as best method for advertising. 75 per cent and 87 per cent respondents of Sindh and South Punjab suggest display centre and 38 per cent and 48 per cent of same provinces suggest exhibition for advertising. Most of respondents suggest display centre as best method for advertising but 90 per cent respondents of Bahawalpur suggest exhibition the best method.

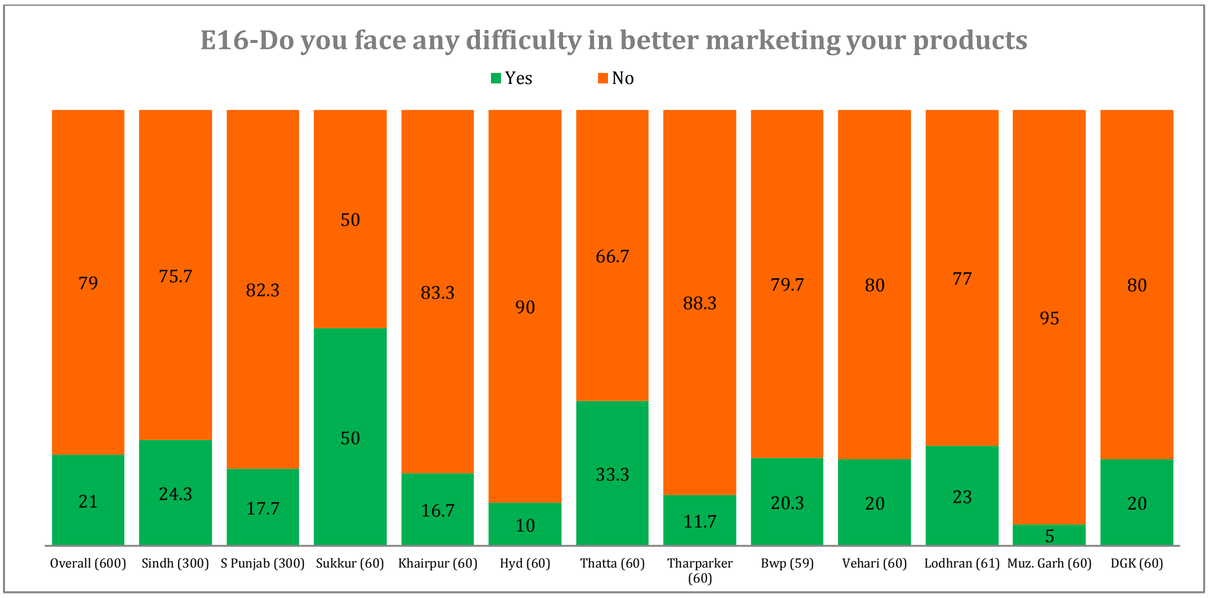


Figure 51

Overall 79 per cent artisans face difficulty in marketing their products. The level of difficulty in South Punjab is 82.3 per cent which is higher than level in Sindh which is 75.7 per cent. But the difference is not much significant. In Sindh, 90 per cent the artisans of Hyderabad face difficulty which is higher among all districts of Sindh. Similarity, 88.3 per cent artisans of Khairpur and Tharparkar also face the difficulty for marketing.

In South Punjab, the highest level of difficulty is seen in among artisans of Muzaffargarh which is 95 per cent. In Vehari and DG Khan, 80 per cent artisans face difficulty to market their crafts.

It means that artisans in both provinces face difficulty to market their product.

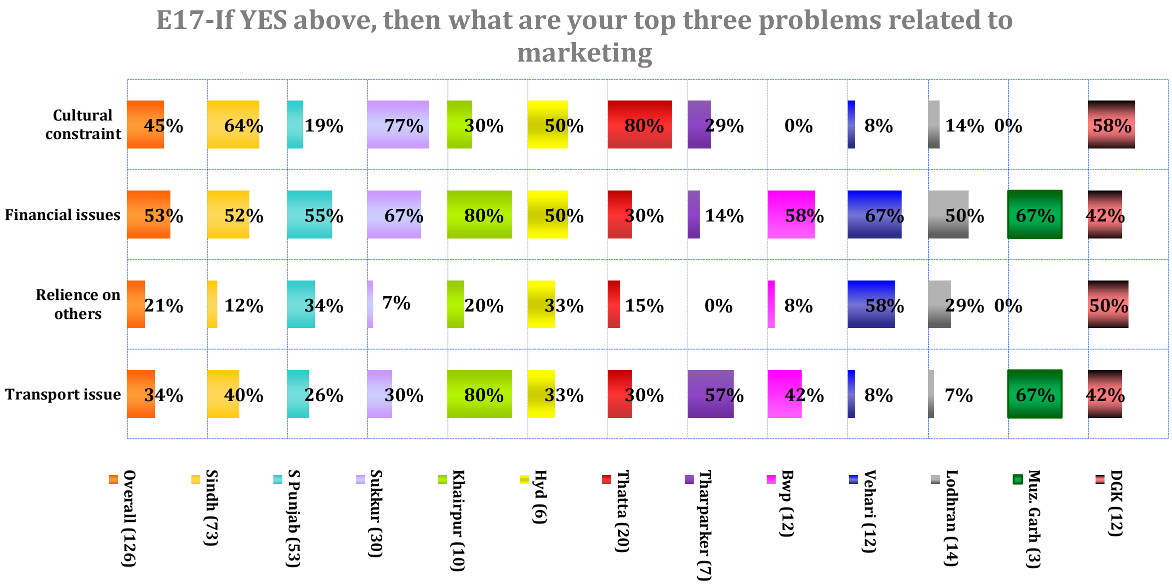


Figure 52

Overall 53 per cent respondents say financial issues is problems, 45 per cent respondents think cultural constraint10 is problem, 34 per cent think transport issue and 21 per cent reliance on other are problems for marketing. In Sindh, 64 per cent say cultural, 52 per cent say financial issues, and 40 per cent say transport issue for marketing. In South Punjab, 19 per cent think cultural issue, 55 per cent say financial issue, 34 per cent say reliance on others and 26 per cent I think transport issue for marketing. Most respondents of Tharparkar and (80 per cent) and Sukkur (77 per cent)face cultural issue and 80 per cent respondents of Khairpur face financial and transport issues for marketing. In South Punjab, mostly financial, and transport issues are for marketing.

[10] Advertising by women artisans deemed inappropriate, perceived violation of privacy, permission issues with male family members

Access to Finance and Skills

This chapter summarizes baseline findings on artisan's access to finance and skills. Findings are presented on:

- How artisan finance their business
- Whether they have bank account or not
- Whether they are aware of sources of micro-finance in their areas
- Are they interested in getting credit and on what terms?
- Where have they learned the skills of textile crafts?
- What types of training do they need necessary for their enterprise

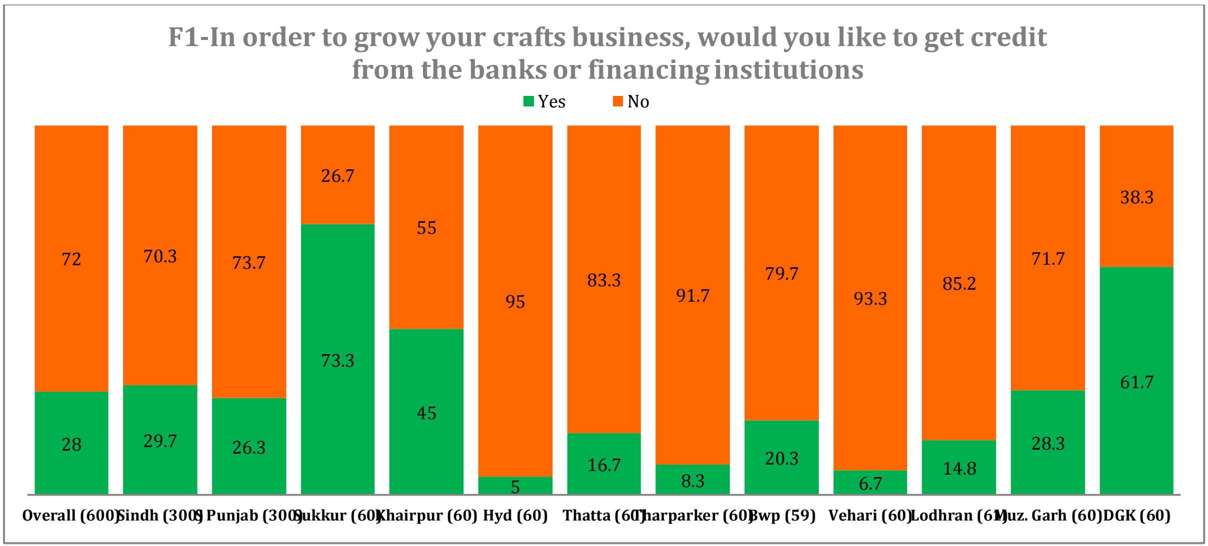


Figure 53

Overall 28 per cent of respondents would like to get credit from the banks or financing institution to grow their crafts business. There is no significant difference at provincial level, 30 per cent respondents and 26 per cent respondents in Sindh and South Punjab respectively. Strangely, 73 per cent respondents (the highest) of Sukkur want to get credit from the banks or financing institution to grow their crafts business but only 5 per cent respondents (the lowest) want to get loan. Most of respondents do not like to get a loan from any bank or financial institution. In South Punjab, 62 per cent respondents (the highest) of DG Khan want loan only but 7 per cent of respondents in Vehari want a loan.

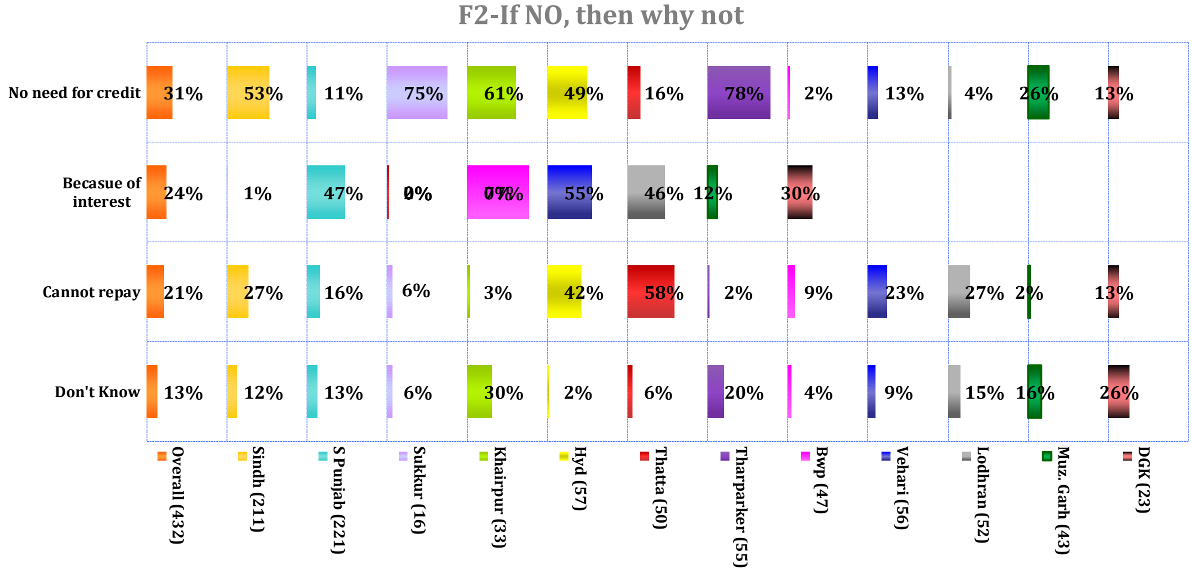


Figure 54

Overall 31 percent respondents say that they do not need any loan, 24 per cent say they do not like loan because of interest, 21 percent think that they will hardly repay so they do not get loan. In Sindh, 78 per cent respondents of Tharparkar say that they no need loan. Similarly, 75 per cent respondents of Sukkur also do not need any loan. But 77 per cent respondents of Khairpur avoid loan because of interest. In Punjab, 30 per cent respondents of Bahawalpur a avoid loan because of interest and 27 per cent respondents of Lodhran do not take loan because they think they cannot repay.

Most respondents are not interested in getting loan because loan is not their need and they also avoid because of interest.

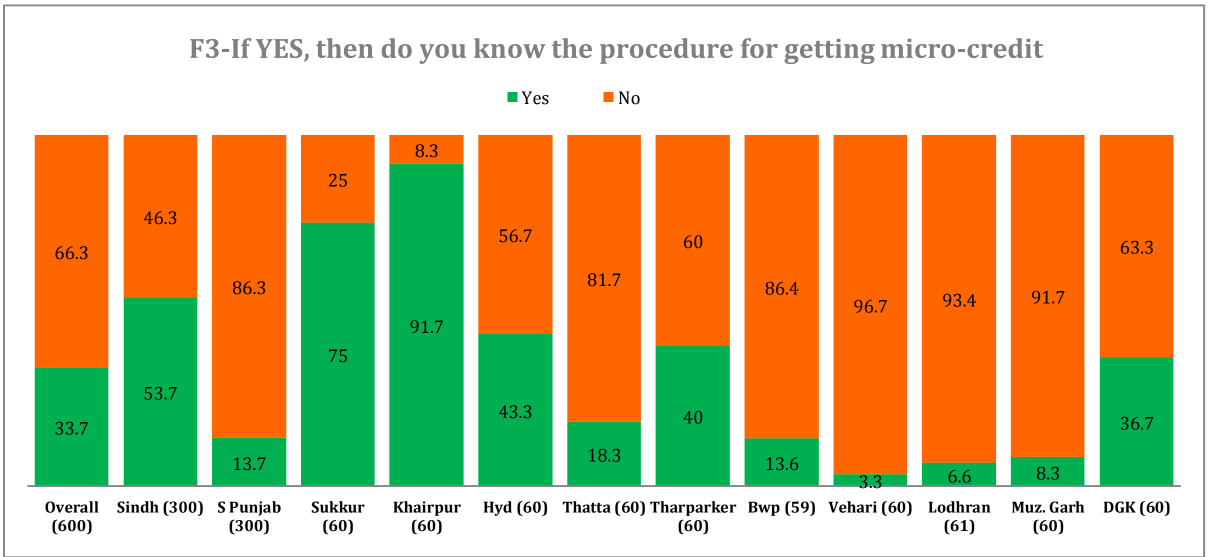


Figure 55

Overall 33.7 per cent want to know the procedure for getting micro-credit. In Sindh (53.7 per cent), the ratio of knowing loan procedure is higher than South Punjab (13,7 per cent). 91. 7 per cent respondents (the highest) want to know loan procedure and 18.3 per cent (the lowest) respondents of Thatta want to know loan procedure. In South Punjab, most of respondents do not like to know loan procedure. 36.7 per cent respondents (highest) of DG Khan want to know loan procedure and 3.3 per cent (the lowest) respondents of Vehari want to know procedure.

At provincial level, the respondents of Sindh are more interested to know loan procedure as compare to South Punjab respondents.

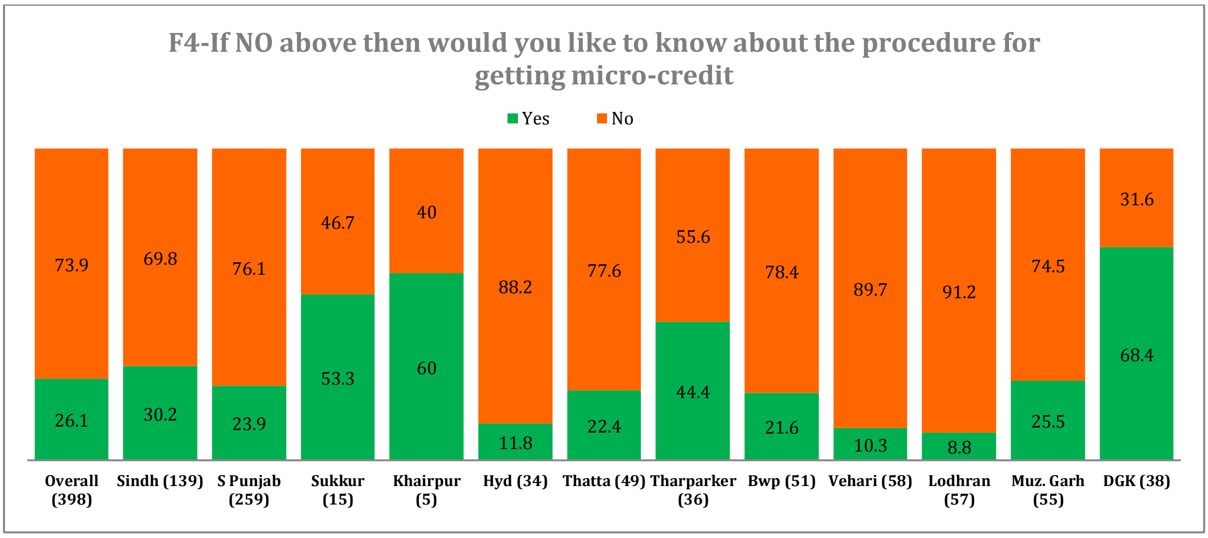


Figure 56

Overall 26.1 per cent respondents like to know the procedure for getting micro-credit and 73. 9 per cent respondents refuse to get information. 30.2 per cent and 23.9 per cent respondents of Sindh and South Punjab like to know the procedure for getting micro-credit. It means most of respondents are not interested. In Sindh, 60 per cent respondents (the highest) of Khairpur are interested and 88.2 per cent respondents (the highest) of Hyderabad are not interested to know the procedure for getting micro-credit. In South Punjab, 68.4 per cent respondents (the highest) of DG Khan show their interest to know the procedure for getting micro-credit. On other hand, 91.2 percent respondents (the highest) of Lodhran are not interested to know the procedure for getting micro-credit.

Mostly, respondents of both provinces refuse to know the procedure for getting micro-credit.

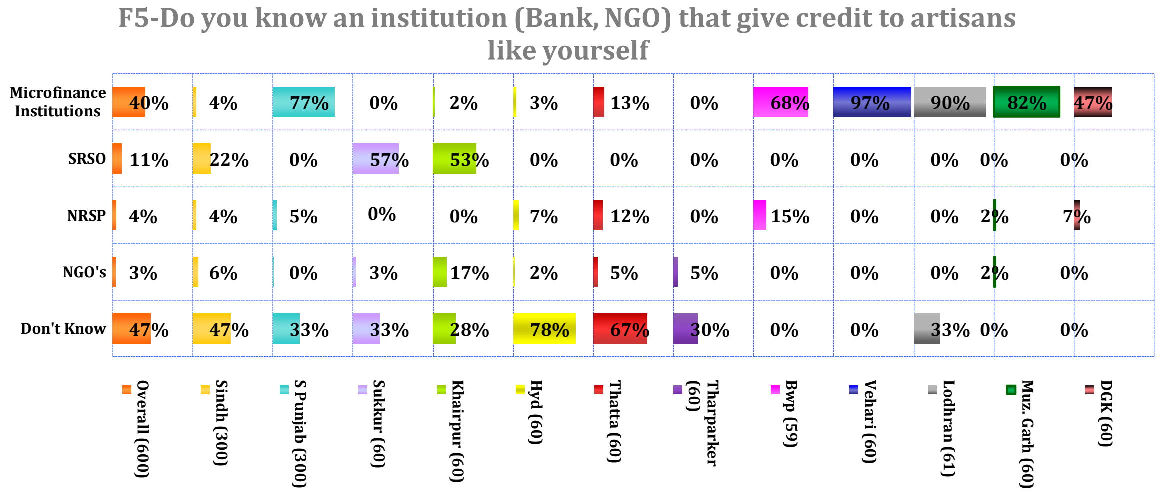


Figure 57

Overall 40 per cent respondents know an institution (Bank, NGO) and 11 per cent know SRSO that give credit to artisans. 47 per cent respondents do not have any information about any institution (Bank, NGO) that give credit to artisans. 22 per cent respondents of Sindh know SRSO and 77 per cent respondents of South Punjab know Micro Finance Institution. 78 per cent and 67 per cent respondents of Hyderabad and Thatta respectively do not have any information about any institution (Bank, NGO) that give credit to artisans. 57 per cent and 53 per cent respondents of Sukkur and Khairpur respectively know SRSO that give credit to artisans. In South Punjab, 97 percent, 90 percent and 82 per cent respondents of Vehari, Lodhran and Muzaffar Garh know micro finance institution. Most of the respondents of South Punjab do not know any other institution except micro finance.

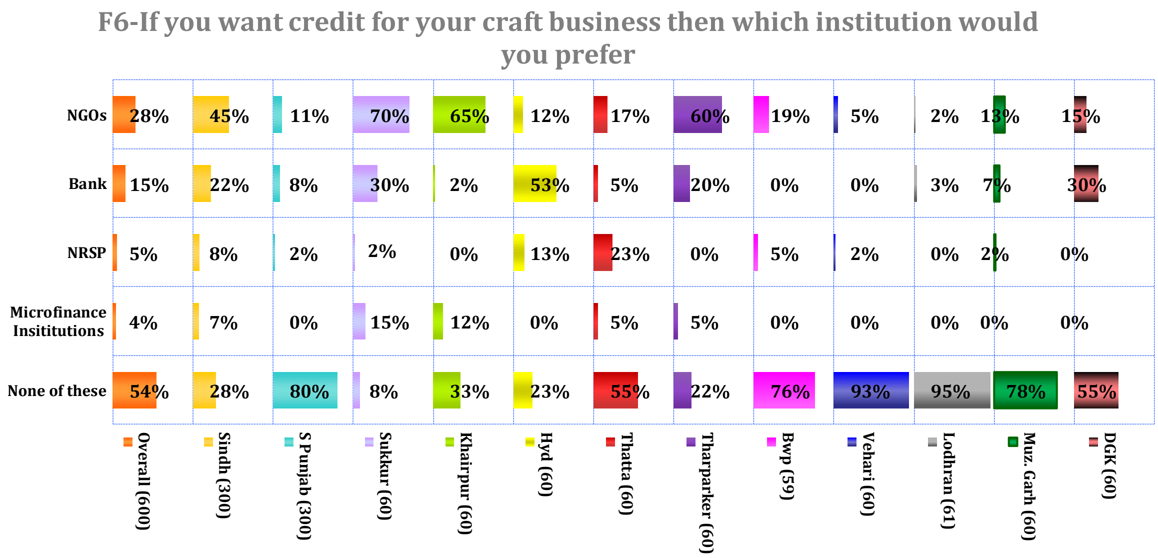


Figure 58

Overall 54 per cent respondents (the highest) reject NGOs, Bank, NRSP and micro finance institution for credit. Only 28 percent respondents prefer NGOs for credit. In Sindh, 45 per cent respondents prefer NGOs whereas 54 per cent respondents of South Punjab neither do nor prefer any institution for credit. In Sindh, 70 percent and 65 per cent respondents of Sukkur and Khairpur trust on NGOs and 53 per cent respondents of Hyderabad prefer bank. In South Punjab, 95 per cent and 93 per cent respondents of Lodhran and Vehari respectively do not prefer any institution for credit. 30 per cent respondents of DG khan prefer bank.

Trust level of most of respondents in both provinces for credit is little.

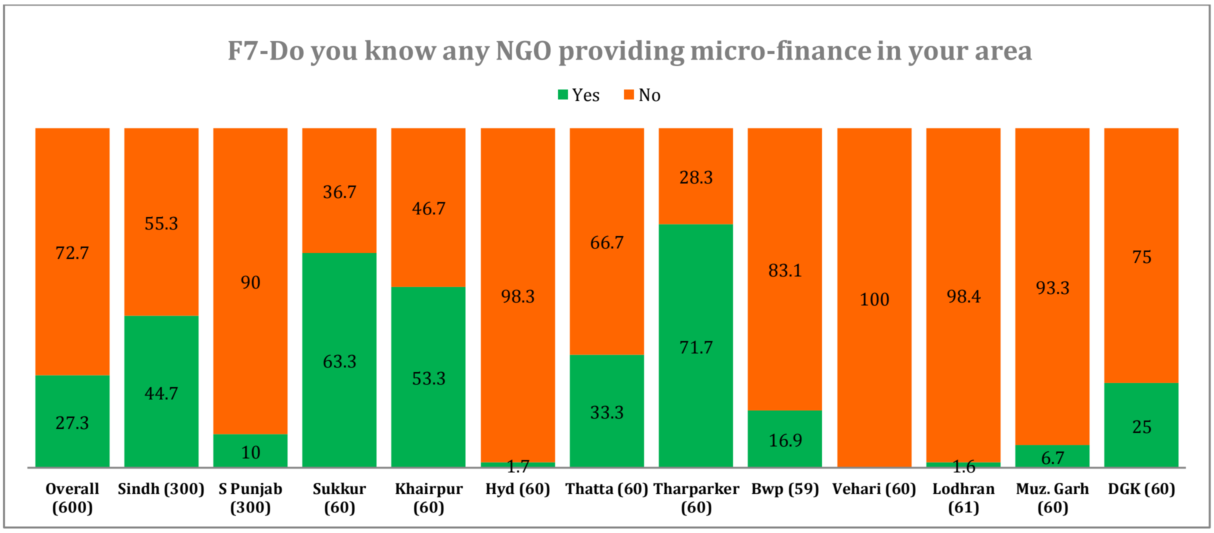


Figure 59

Overall 27.3 per cent respondents know NGO providing micro-finance in area where as 72.7 per cent do not know any NGO providing micro-finance. In Sindh, 44.7 percent and in South Punjab only 10 per cent respondents know NGO providing micro-finance in their areas. 98.3 per cent respondents of Hyderabad do not know any NGO whereas 71.7 per cent respondents of Tharparkar know NGO providing micro-finance in their areas. In South Punjab, 100 per cent, 98.4 per cent and 93.3 per cent respondents of Vehari, Lodhran and Muzaffargarh do not have any information about any NGO providing micro-finance in their areas.

Most of respondents do not know any NGO providing micro-finance in their areas.

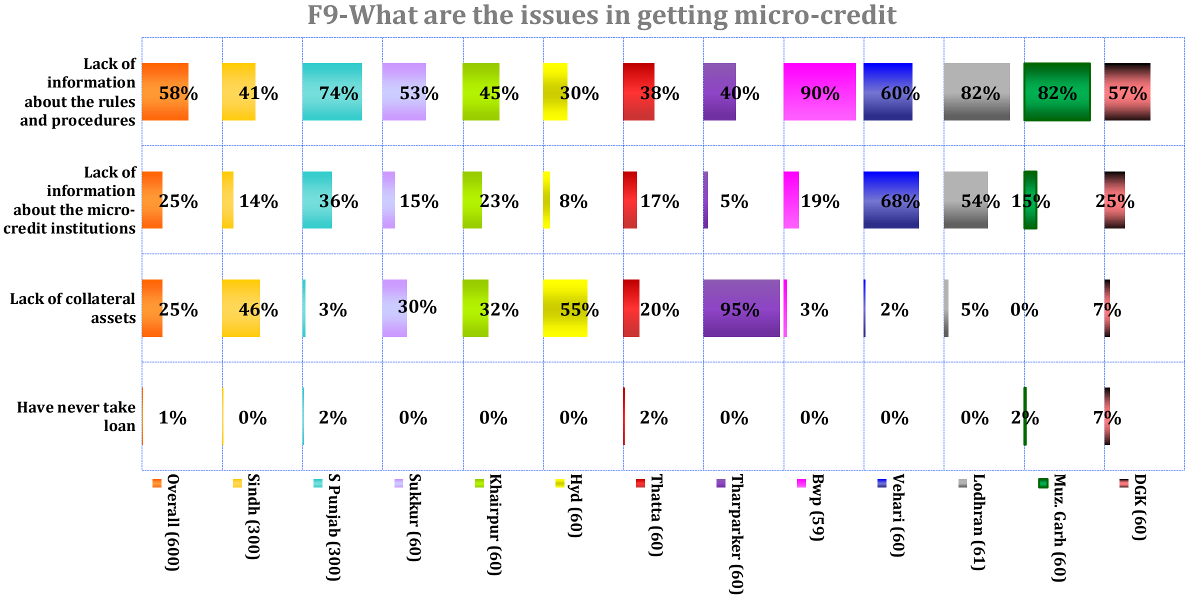


Figure 60

Overall 58 per cent of respondents say lack of information about rules and procedures and 25 per cent of respondents say lack of information about micro-credit institutions and lack of collateral assets are major issues in getting micro-credit. In Sindh and South Punjab, 41 per cent and 74 per cent respondents consider lack of information about rules and procedures as major issue. Moreover, 36 per cent respondents of South Punjab think lack of information about micro-credit institutions is also an issue. In Sindh, 95 per centand 55 per cent respondnets of Tharparkar and Hyderabad consider lack of collateral assets as an issue and 53 per cent respondents of Khairpur say lack of information about rules and procedures as an issue. In South Punjab, 90 percent, 82 per cent respondents of Bahawalpur, Lodhran and Muzaffargarh say lack of information about rules and procedures. Moreover, 68 per cent and 54 per cent respondents of Vehari and Lodhran respectively say lack of information about micro-credit institutions.

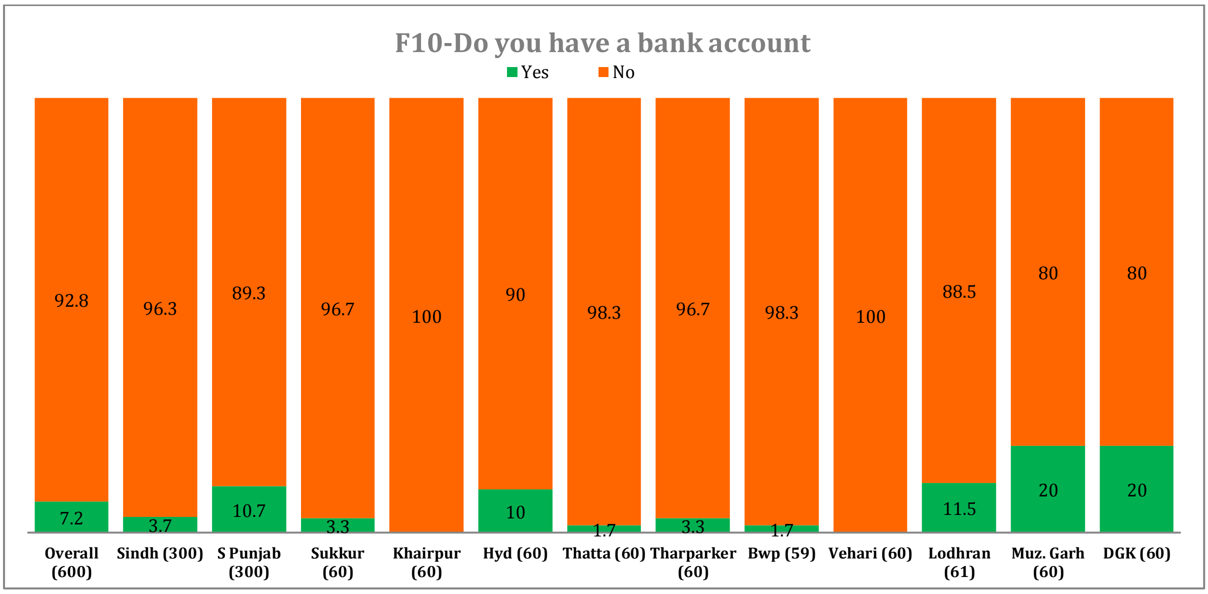


Figure 61

Overall 92.8 per cent respondents have no bank account. In Sindh and South Punjab, 3.7 per cent and 10.7 per cent respondents respectively have bank account. In Sindh, 10 per cent respondents of Hyderabad have bank account whereas in South Punjab, 20 per cent respondents of Muzaffargarh and DG Khan have bank account.

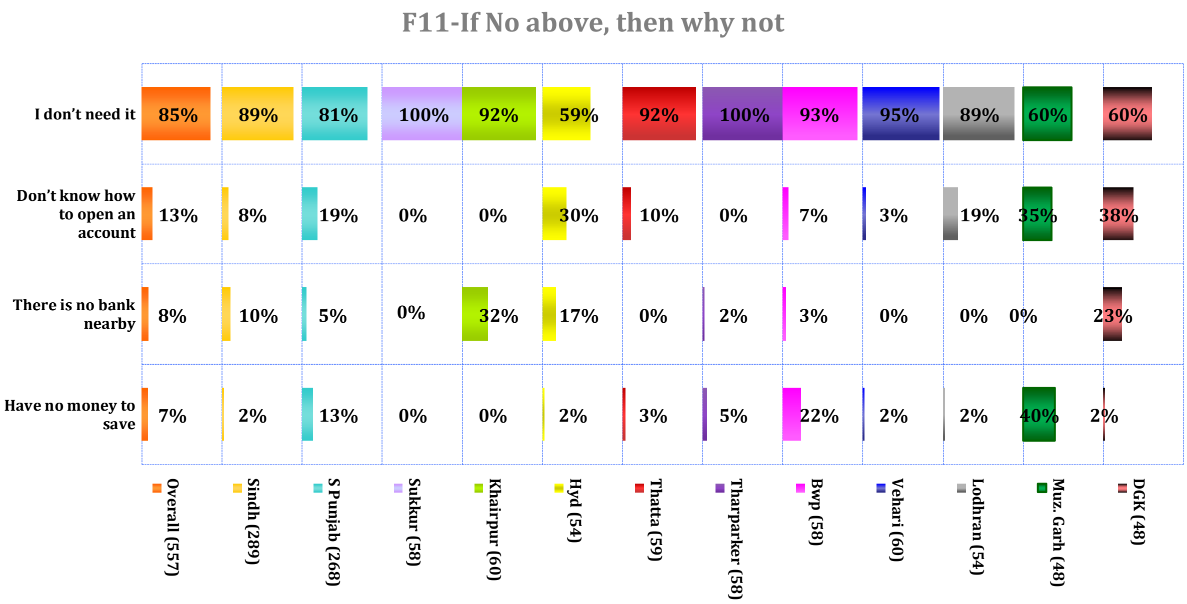


Figure 62

Overall 85 per cent respondents say that they do not need to have an account. Moreover, 89 per cent and 81 per cent respondents of Sindh and South Punjab do not need to have bank account whereas 19 per cent respondents of South Punjab do not know how to open bank account. In Sindh, 100 per cent respondents of Sukkur and Tharparkar and 92 per cent respondents of Khairpur and Thatta do not need to have an account. 30 per cent respondents of Hyderabad do not know how to open bank account and 32 per cent and 17 per cent respondents of Khairpur and Hyderabad respectively do not have bank nearby. In South Punjab, 95 per cent, 93 per cent and 89 per cent respondents of Vehari, Bahawalpur and Lodhran respectively do not need bank account. 38 per cent and 35 per cent respondents of DG Khan and Muzaffargarh respectively do not know how to open bank account. 40 per cent respondents of Muzaffargarh have no saving.

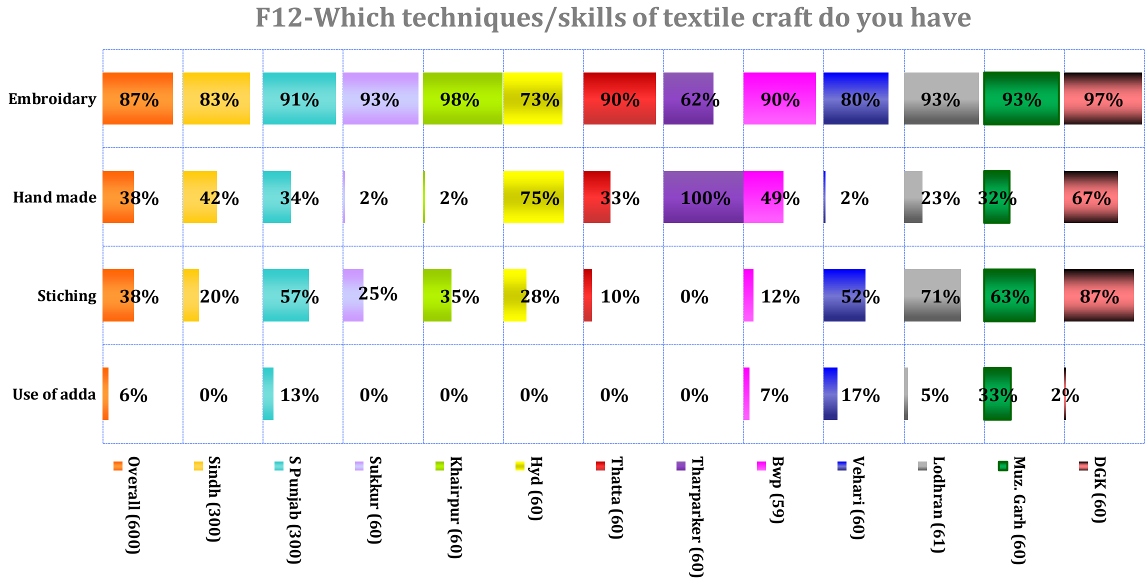


Figure 63

Overall 87 per cent respondents say that they embroidery skill(Topi banana, Zarai ka kaam, Makesh ka kaam, Ghota kinari, Sheed work, Chawal wali kardhai etc.), 38 per cent respondents are involve in handmade crafts and stitching. In Sindh, 83 per cent respondents say that they embroidery skill, 42 per cent respondents are involve in handmade crafts (Guldasta moti say banana, Moti ke har banana, Prandy, Raily cut work, Kangan banana, Pars banana, Shesha lagana, Taar kasha, Korry ka kaam, Moti ke kaam, etc.) and 20 per cent have stitching skill. Moreover, in South Punjab,91 per cent respondents say that they embroidery skill, 57 per cent respondents are involved in stitching and 34 per cent in handmade crafts. In Sindh, 98 per cent, 93 per cent, 90 and 73 per cent respondents of Khairpur, Sukkur, Thatta and Hyderabad respectively have embroidery skill and 100 per cent, 75 per cent and 33 per cent respondents of Tharparkar, Hyderabad, and Thatta are involved in hand made craft.

In South Punjab, 97 per cent, 93 per cent, 90 and 80 per cent respondents of DG Khan , Lodhran, Muzaffar Garh, Bahawalpur and respectively have embroidery skill and 67 per cent, 49 per cent and 32 per cent respondents of DG Khan , Bahawalpur and Muzaffar Garh are involved in hand made craft. Moreover, 87 per cent, 71 per cent and 63 per cent respondents of DG Khan, Lodhran and Muzaffar Garh respectively involved in stitching (Bag sheet, Takeye banana, Orosi malbosat etc). 33 per cent respondents of Muzaffar Garh use adda.

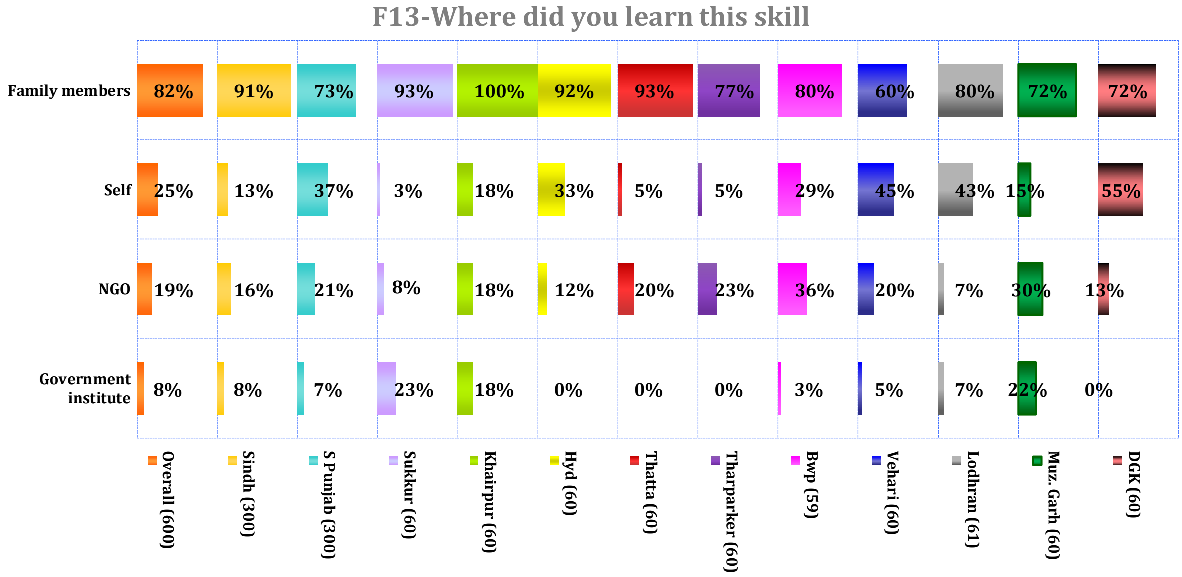


Figure 64

Overall 82 per cent of respondents say that they learnt skills from their family members (mothers, sisters, sister in-law, mother in-law, cousins, maternal and paternal aunts). 25 per cent and 19 per cent respondents say they learnt skills themselves and from NGO respectively.

In Sindh and South Punjab, 91 per cent and 73 per cent respondents respectively learnt from family members and 13 percent and 37 per cent respondents learnt skills themselves. 21 per cent respondents from South Punjab learn from NGO. In Sindh, 100 per cent, 93 per cent, 92 per cent and 77 per cent respondents of Khairpur, Sukkur, Thatta and Hyderabad respectively. 23 per cent and 20 per cent respondents of Tharparkar and Thatta respectively learnt skill t from NGO respectively. 33 per cent and 18 per cent respondents of Hyderabad and Khairpur learn skills themselves.

In South Punjab, 80 per cent, 72 per cent and 60 per cent respondents of Bahawalpur, Lodhran, Muzaffar garh, DG Khan and Vehari respectively learnt skills from their family members. Moreover, 55 per cent, 45 per cent and 43 per cent respondents of DG Khan, Vehari and Lodhran respectively learnt skills themselves. In Lodhran and Muzaffar Garh, 36 per cent and 30 per cent respondents respectively leant skills form NGO. In Muzaffar Garh, 22 per cent respondents learn from government institute.

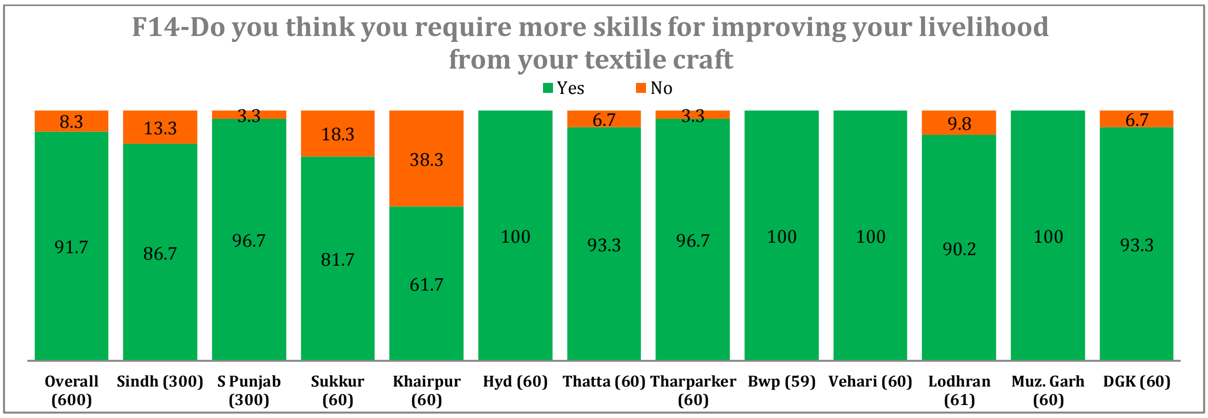


Figure 65

Overall 91.7 per cent respondents say that they require more skills for improving their livelihood from their textile craft. The respondents of Sindh (86.7 per cent) and South Punjab (96.7 per cent) require more skills for improving their livelihood from their textile craft. In South Punjab, all the respondents of Vehari and Bahawalpur need more skills. Across the provinces and districts, the respondents require skill for improvement.

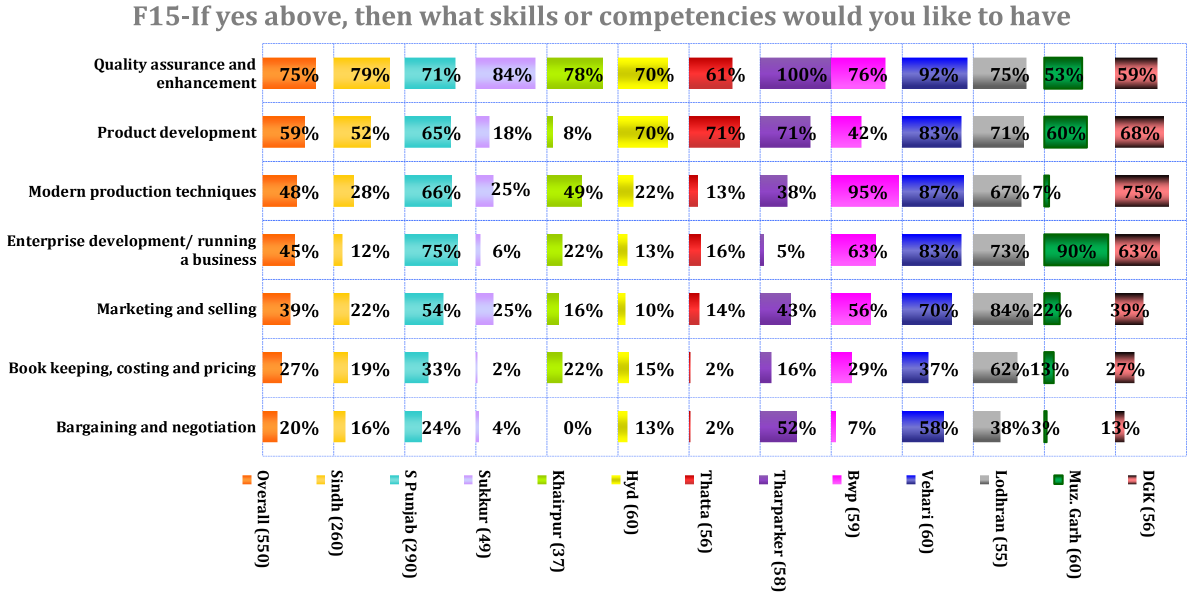


Figure 66

Overall 75 per cent, 59 per cent, 48 per cent, 48 per cent, 45 per cent and 39 per cent respondents would like to have competency in quality assurance, product development, production techniques, entrepreneur skills and marketing and selling respectively. The respondents of South Punjab have higher expectation level than respondents of Sindh. In Sindh, 100, per cent, 84 per cent, 78 and 70 per cent respondents of Tharparkar, Sukkur, Khairpur and Hyderabad, respectively expect competency in quality assurance. 71 per cent, 70 per cent and 65 per cent respondents of Tharparkar, Thatta and Sukahr respectively want competency in product development. Moreover, 75 per cent, 66 per cent 54 per cent respondents Sukkur respectively want competencies in production techniques and marketing and selling respectively.

In South Punjab, 92 per cent and 76 per cent respondents of Vehari and Bahawalpur respectively want competency in quality assurance. 83 per cent, 71 per cent, 68 per cent respondents of Vehari, Lodhran and DG Khan want competency in product development. Moreover, 90 per cent and 83 per cent respondents of Muzaffar Garh and Vehari respectively want improvement in production techniques. Among South Punjab districts, respondents of Vehari and Lodhran want more competencies in all areas as compare to respondents of other districts.

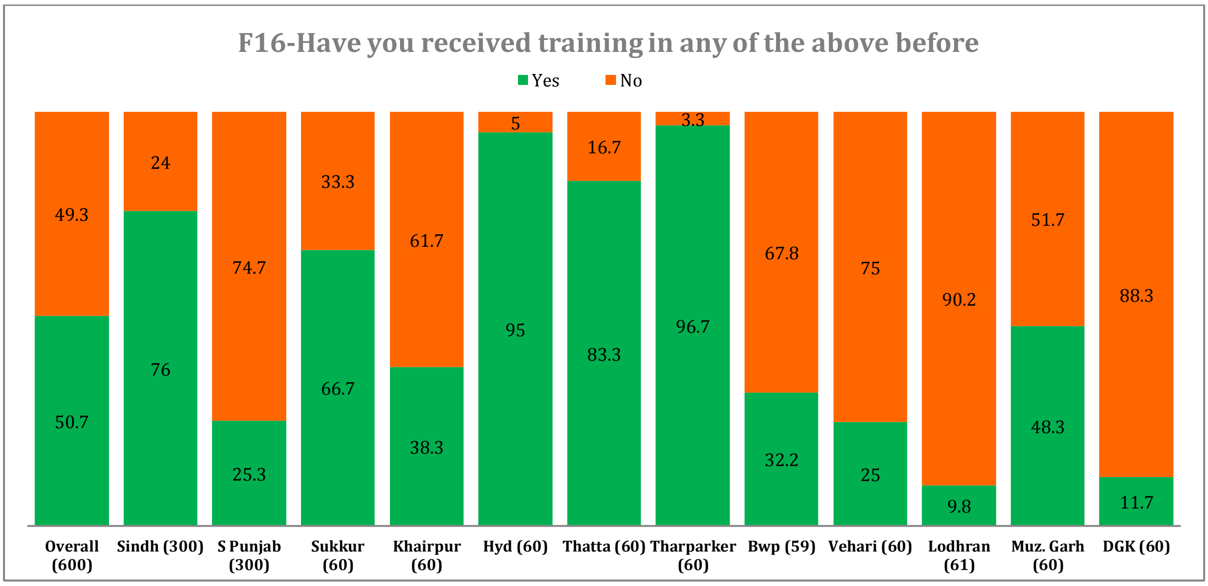


Figure 67

Overall 50.7 per cent respondents say that they have received. More respondents of Sindh received training as compare to respondents of South Punjab. Most respondents of Tharparkar and Hyderabad have received training in Sindh. But in South Punjab, small numbers of respondents have received training. Most respondents of Lodhran and DG Khan have not received training.

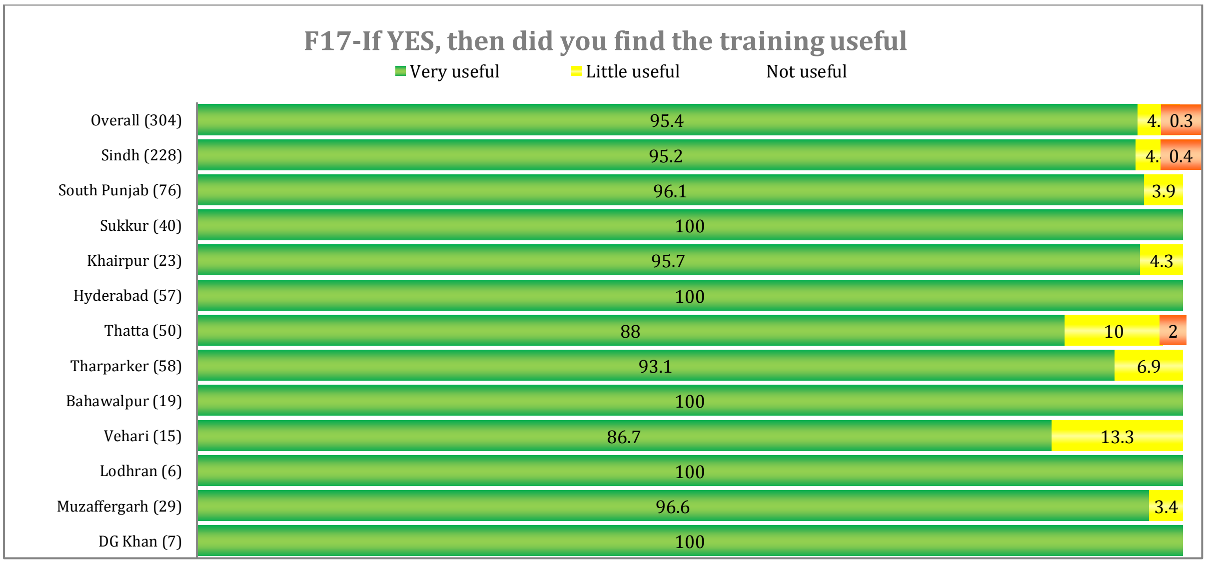


Figure 68

Most of respondents of both provinces and all districts have found training very useful. In Vehari and Thatta, 13 per cent and 10 per cent respondents respectively found training little useful.

F19_From which organization did you get the training in above

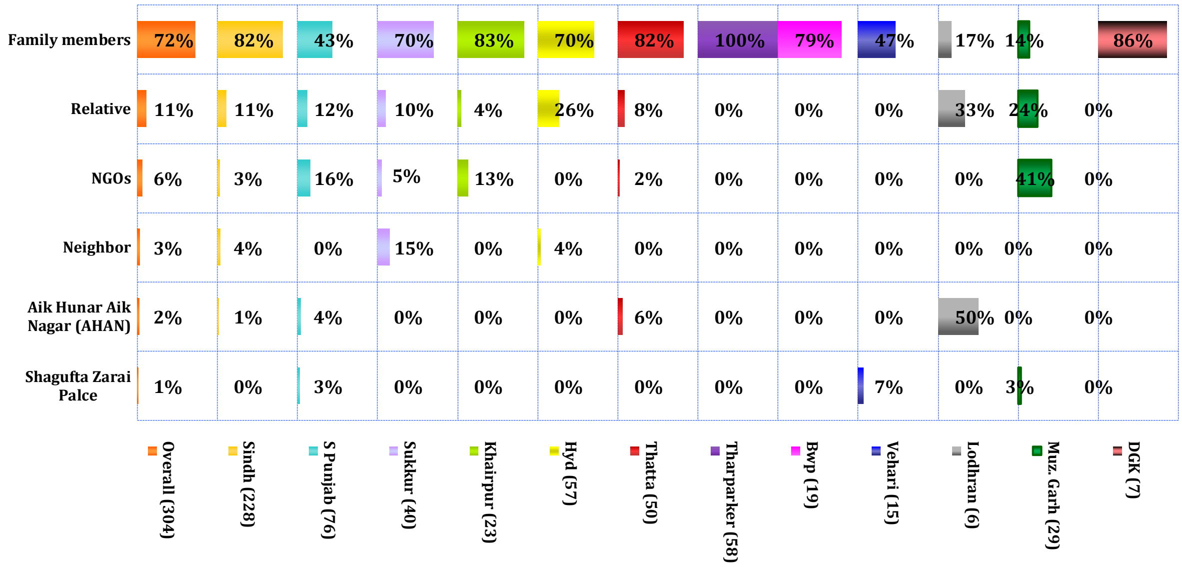


Figure 69

Overall 72 per cent and 11 per cent respondents received training from family members (mother, sister, grandmother, sister in-law, mother in-law) and from relatives (paternal and maternal aunts, cousins) respectively. Across the provinces and districts, most of the respondents received training from their family members and relatives. In South Punjab, 41 per cent respondents of Muzaffar Garh and 50 per cent respondents of Lodhran received training from NGO and AHAN respectively.

Self-Organization

This chapter presents baseline findings on the question of existing level of self-organization among the artisan of the Sindh and South Punjab. This section also explores artisan's viewpoints of organizing self-help groups and what they expect from such mechanisms of institutionalization for sustainability.

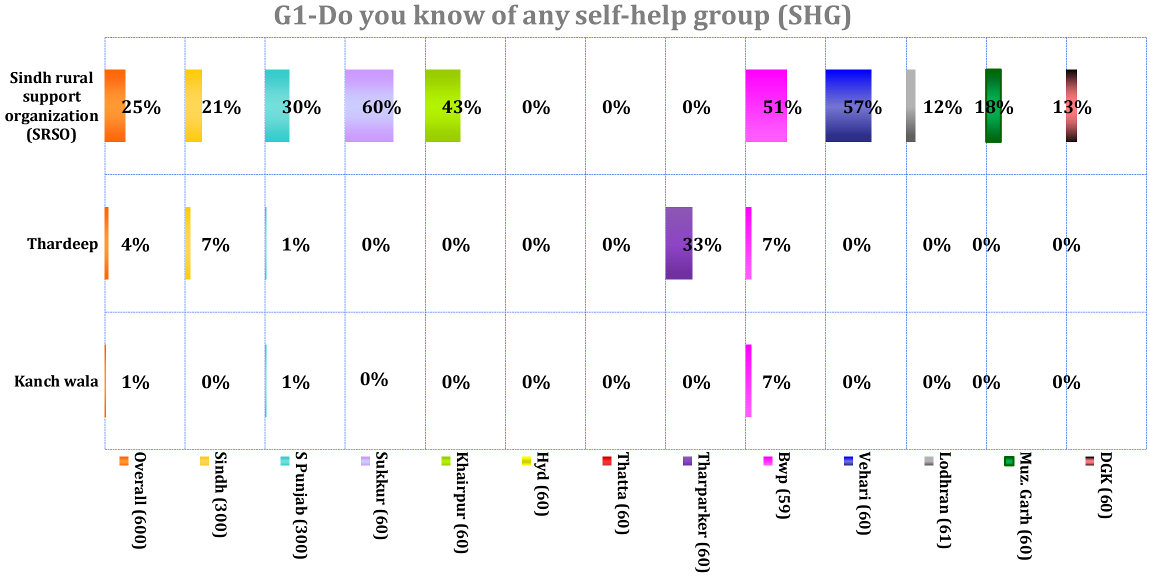


Figure 70

Overall respondents 25 per cent know SARSO, 4 percent respondents know Thardeep and only 1 per cent respondents know Kanch wala. The highest level which is 30 per cent is seen in South Punjab and 21 per cent is seen in Sindh. Interestingly, the respondents (0 per cent) of Hyderabad and Thatta do not know any SHG. Strangely, the 57 per cent and 51 per cent respondents of Vehari and Bahawalpur know SARSO (SARSO works in Sindh).

In other words, the level of information about SHG is very low in both provinces.

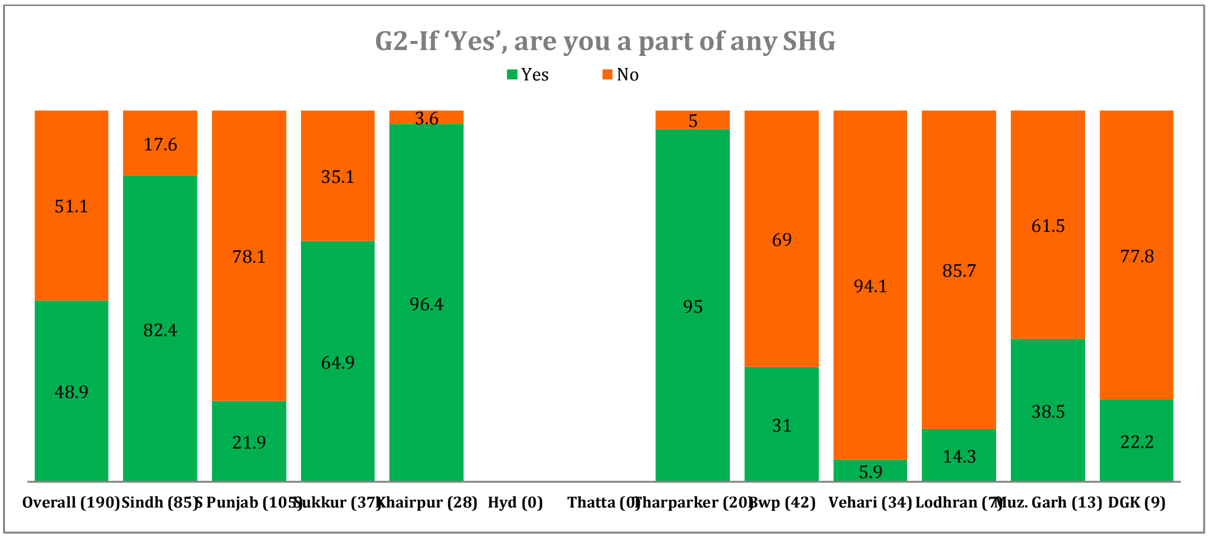


Figure 71

Overall 48.9 per cent respondents want to be member of SHG. The respondents of Sindh are on highest level which is 82.4 per cent want to be member and respondents in South Punjab, are at the lowest level which is only 21.9 per cent. In Sindh, the highest response, 96.4 per cent is seen in Khairpur followed by Tharparkar which is 95 per cent. But respondents of Hyderabad and Thatta have shown 0 per cent response to join an SHG.

In Punjab, the lowest level is seen in Vehari which is 94.1 followed by Lodhran 85.7 per cent. In means that in South Punjab respondents are not interested to join any SHG. But most of respondents in Sindh want join n SHG.

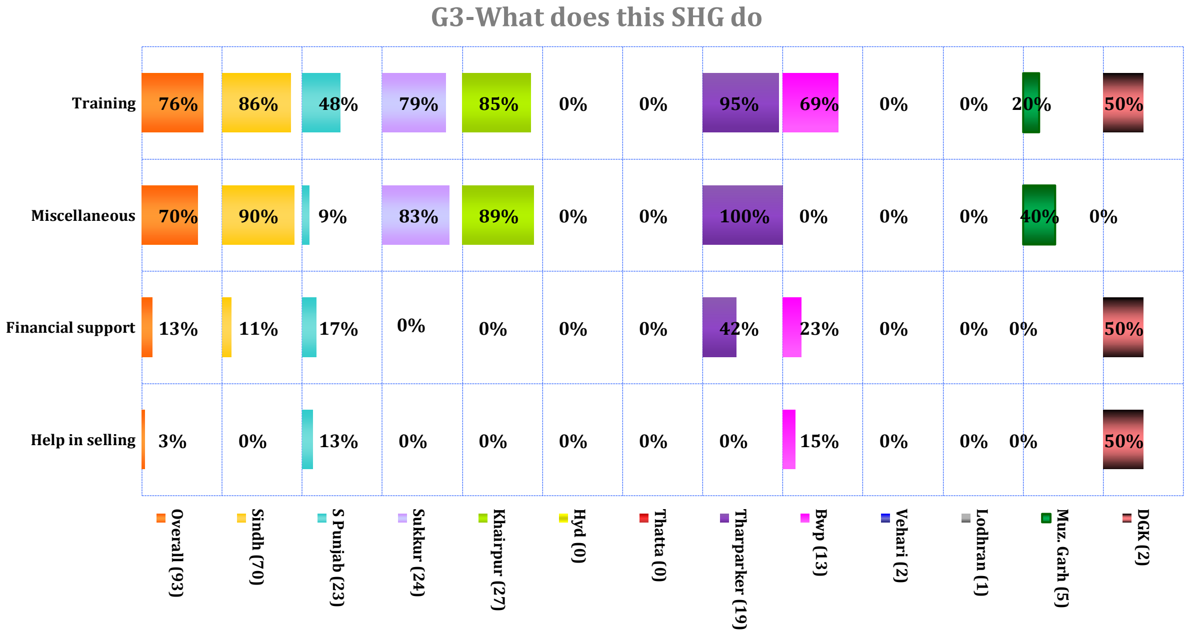


Figure 72

Overall 76 per cent respondents think an SGH will help in training, 70 per cent respondents think about miscellaneous role (help markets links, provide equipment, raw materials, bring order etc). The miscellaneous role is seen 90 per cent which highest and in South Punjab, the highest value is for training. The respondents of Tharparkar have found 100 per cent miscellaneous role and 95 per cent help in training. But respondents of most of districts in Sindh will find 0 per cent role in help in selling.

In South Punjab, the highest level, 69 per cent is seen in Bahawalpur. But as compare to Sindh response, in South Punjab, 50 per cent respondents of DG Khan will find the role of SHG for help in selling.

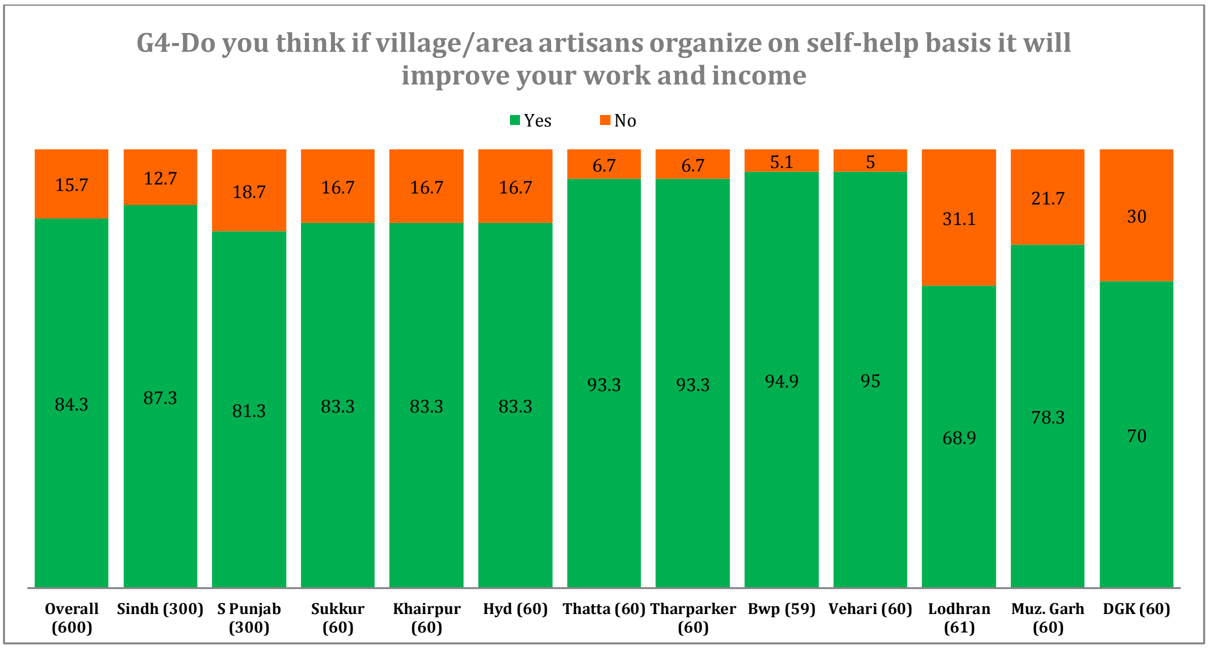


Figure 73

Overall 84.3 per cent respondents think that SHG will improve their work and income. 87.3 per cent respondents of Sindh and 81.3 per cent of South Punjab find the positive role of SHG. Moreover, 93.3 per cent respondents of Thatta and Tharparkar have a lead over respondents of other districts. In South Punjab, 95 per cent respondents of Vehari have a lead among respondents of South Punjab.

But there is no significant difference among all the respondents of two provinces.

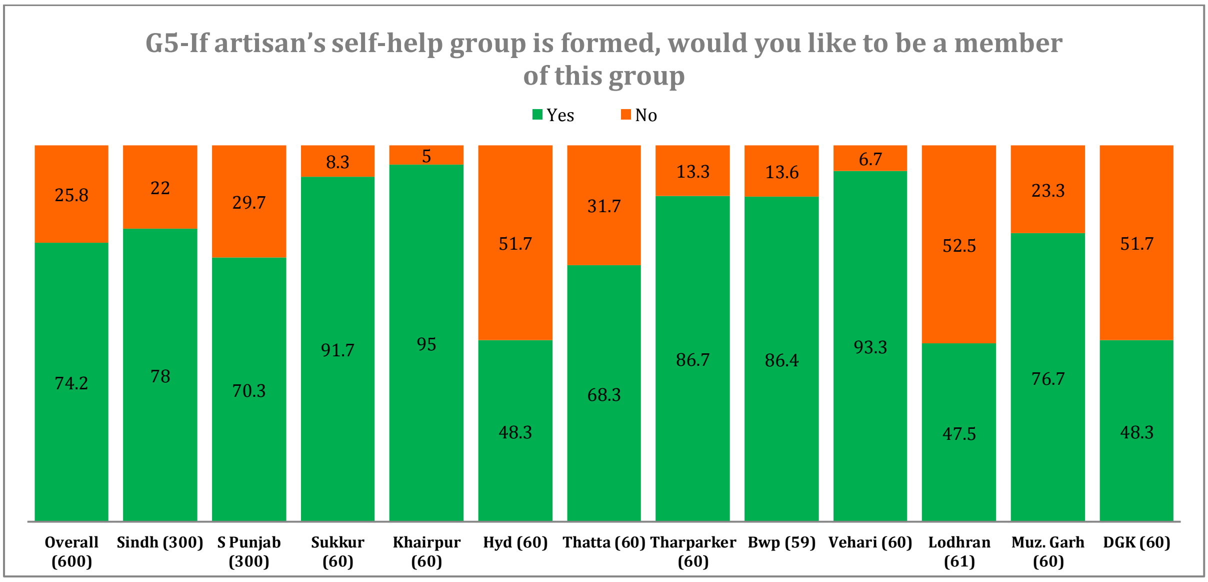


Figure 74

Overall 74 per cent respondents want to be member of an SHG. There is not much difference between perception of respondents of Sindh (78 per cent) and South Punjab (70 per cent). Among districts of Sindh, Khairpur with 95 value stands at highest level and Hyderabad with 48 per cent falls at lowest level. In South Punjab, Vehari with 93 per cent is at highest level and Lodhran with 48 per cent value is at lowest level.

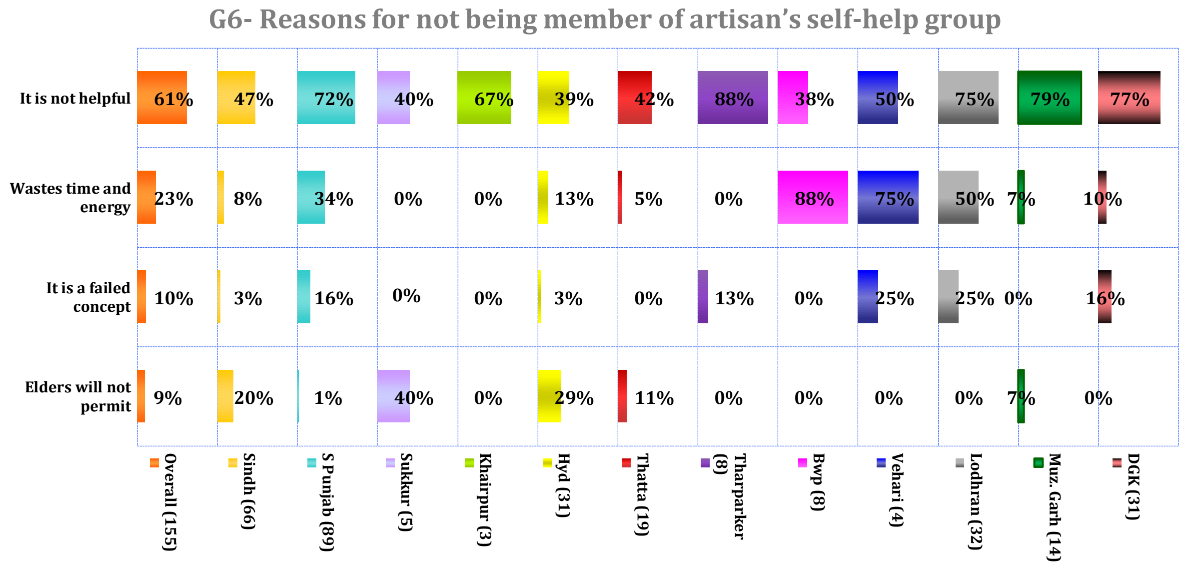


Figure 75

Among the respondents who do not want to be member of SHG think that SHG will not be helpful, it is waste of time activity, it is a failure concept and their elders will not permit it. Most of respondents (61per cent) say that SHG will not help and 23 per cent say it is waste of time and 10 per cent say it is not workable concept. In Sindh province, 47 per cent respondents say membership of SHG is not helpful and 20 per cent say that their elders will not give permission to join SHG. In South Punjab, 72 per cent respondents say SHG is not useful and 34 per cent say SHG membership will be waste of time. Among districts of Sindh, 88 per cent respondents of

Tharparkar say SHG is not helpful but they do not think it is waste of time and there is issue of permission from elders. In Sukkur, 40 per cent respondents find issues of elders' permission and same strength of respondents say SHG will not be helpful. In South Punjab, 88 per cent respondents of Bahawalpur say SHG is waste of time and 79 per cent respondents of Muzaffar Garh think SHG is not helpful for their crafts. In South Punjab, permission from elders is not an issue.

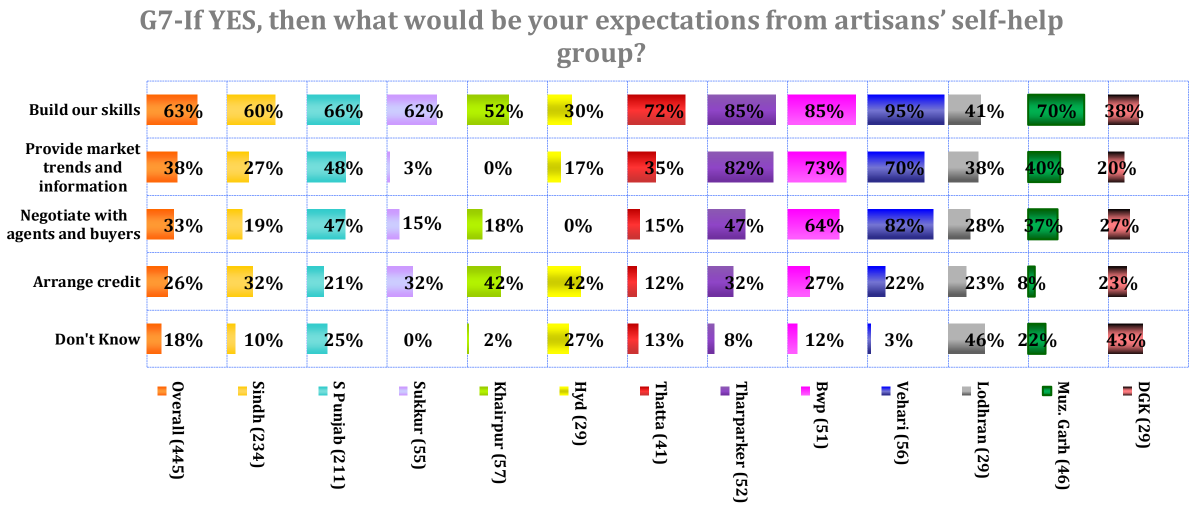


Figure 76

Overall 63 per cent respondents expect SHG will help in building their skills, 38 per cent expect help in market links, 33 per cent expect improvement in negotiation with agents and customers. 60 per cent respondents of Sindh expect their capacity building, and 66 respondents of South Punjab also expect their capacity building. Moreover, 85 respondents of Thatta district of Sindh expect their capacity building and 82 per cent respondents expect help in market links. Similarly, 95 respondents of Vehari district of South Punjab expect their capacity building and 82 per cent respondents expect better negotiation skill. Most of respondents expect capacity building and market links.

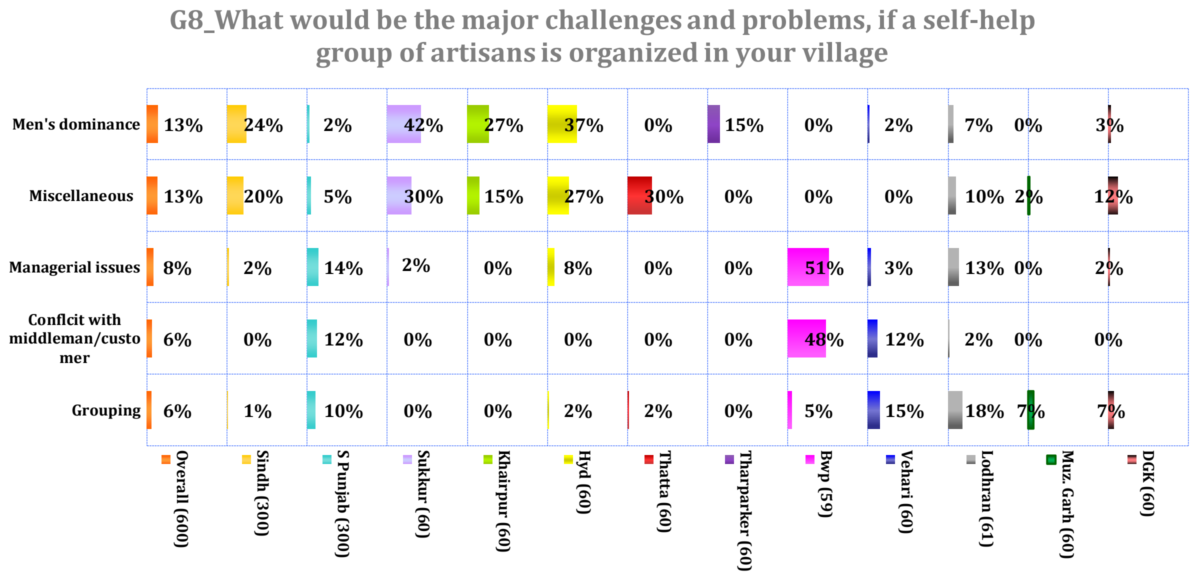


Figure 77

Overall, there are no significant challenges will be faced by SHG. 13 per cent respondents say men dominance will be an issue and miscellaneous (people ridicule it, availability of members etc.) In Sindh, managerial issues will be at minor level but 42 per cent man dominance will be in Sukkur . But In South Punjab, 51 per cent managerial issues and 48 per cent conflict with middleman will be faced in Bahawalpur.

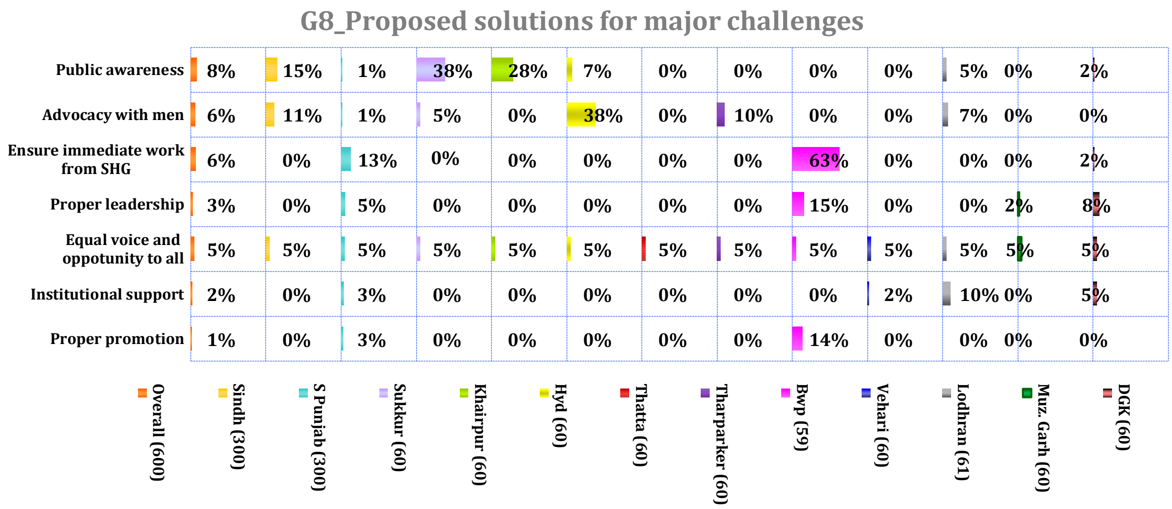


Figure 78

Overall, there is no important solution to handle the challenge is given. Public awareness stands at top. At provincial level, there are no major solutions provided. In Sindh, 38 per cent and 28 per cent respondents of Khairpur and Hyderabad respectively find public awareness as solution. In South Punjab, 63 per cent respondents think that immediate work with SHG (it must be ensured that members are loyal and sincere) will be solution to hand le problems.

Insights from Experts Interviews

This chapter consolidates the findings from qualitative interviews conducted with eight experts in value chains of textile crafts. These were professionals involved in marketing of textile crafts, fashion designers and value chain experts working in the crafts industry of Pakistan. Annex 5 provides list of experts interviewed in depth.

Challenges faced by the textile crafts industry in Pakistan

Followings are the top five challenges being faced by an artisan in textile crafts, according to experts.

1. Lack of knowledge about value-addition
2. Lack of linkages with buyers and suppliers
3. Lack of aesthetic sense about designs and trends
4. Sustainability of crafts business run or supported by NGOs
5. Lack of research on artisans.

During the interviews it was revealed that little work has been done on artisans' capacity building and design. There is also a lack of technical up-grading and little research on artisans' capital: all of which are the major factors limiting the artisans' ability to earn a decent living in a highly-competitive environment. However, in central Punjab, there has been research on design and production, according to the experts interviewed. They cited Pakistan School of Fashion Design as an example. The artisans of Sindh and South Punjab do not have any orientation to the use of the internet for better craft product development.

An fashion designed in Karachi gave the example of Chinese company and how it handles large orders in textile crafts: 'Chinese company makes deal with Wall Mart for a big order. The Chinese Company then divides the order into smaller portions and assigns each portion to a group of artisans well trained in the needed craft. The crafts producers belong to another company and the packaging is done by yet another vendor company in China. The big order is thus produced in time with quality. This can be done in Pakistan as well provided there are larger efficient players in the value chain. But that is not the case so if Wall Mart orders 50000 pieces of say chunri or falasi[11], how the order can be executed in Pakistan? No way. We have skills but the production mechanism and process is very slow and quality is questionable.'

The other challenges being faced by the textile industry are lack of funds, lack of design intervention, Poor quality of raw material, failure to find end consumer, lack of sensibility, poor color combination and size of craft, energy crises, lack of quality control mechanism, sustainability, lack of usability of craft, tourism at small scale, lack of product development, financial constraints, lack of government support, production planning and capacity, lack of time management, resistance to mobility, little family cooperation and limited local market.

Followings are the textile craft of Sindh and South Punjab that the expert think can be marketing commercially:

[11] Traditional head covering scarves with colourful embroidery

Sr. No	Sindh	South Punjab
1	Chunri	Chunri (Tie and dye)
2	Tie and dye	Tie and dye
3	Glass work, Hala Pottery	Phulkari in DG Khan
4	Dari and khaddar	Dari and khaddar
5	Block printing	Block printing
6	Soosi	Tarakahsi, tapchi
7	Tie and dye((vegetable dyes)	Weaving fabric
8	Sindhi tanka	Khaddar,
9	Hand-made embroidery	Hand-made embroidery
10	Rali	Rali
11	Falasi	Makesh work
12		Khussa (shoe)

Potential for Commercial Marketing of Textile Crafts

The IDI respondents believe that all above mentioned textile crafts can be marketed at local and foreign market provided that value addition, innovation, modernity design intervention, usability, consumer needs and wants are incorporated. Moreover, NGOs can play role for market survey and promotional activities and regulation of middle role to market artisans' crafts at any market.

Reason for local and foreign market demand

One of the major reasons is that the textile craft is cultural specific. West wants cultural heritage keep alive and flourish. Moreover, the crafts of Sindh and South Punjab are distinguished from other cultures of the world because of their uniqueness, beauty of design and usability (for example gift Items made of camel skin). The crafts of these areas are not much expensive to buy.

During the interview, an interesting fact was noted. One of the interviewees says, says, 'The West is interested to revive the history. It will be revival of Sindh history. The clothes (called Sindhrom) of Egyptian mummies were imported from Thatta (Sindh).'

But on the other hand an interviewee says, "There is no demand of textile craft at foreign market because there is no promotion of textile crafts in Pakistan as it is in India, Sri Lanka, Bangladesh and Thailand. Our government has not given textile crafts as industry then how the crafts can be exported. If leather goods and furniture and lawn are exported, handicrafts can also be promoted.'

Production Issues of Textile Crafts

The experts of IDIs highlighted the followings issues

1. Quality of product is no good
2. Quantify of the products is not sufficient
3. Don't have good quality skills as per market demand
4. No resources for bulk production
5. No information about the market trends
6. No information about new design
7. Poor role of NGOs in skill development
8. Financial constraints,
9. Poor organizational coordination,
10. Lack of ambition among the artisans
11. No information about the market trends
12. No information about new design
13. Lack of identification of Artisans' Skills
14. Lack of government support
15. Crafts sector does not have status of industry
16. There is no use of technology to accelerate and to make production fast,

The expert says, 'Artisans are not at fault, government and NGOs do not play significant role. Both are not seriously interested to do something for artisans. NGOs are working at small level. There is need to work on macro level. The skills of the artisans need to be evaluated and not only their capacity of production is built but they need to be linked with market where the produce be sold and artisan economic conditions be better.'

Challenges of artisans of the textile craft in Sindh and South Punjab

The artisans of Sindh and South Punjab face similar challenges because artisans of both areas have similar traditional and cultural characteristics. Followings are the challenges shared by the experts of IDIs.

Sr. No	Sindh	Challenges
1	Chunri	No design input, Poor selling skills,
3	Rali	Poor Color combination
4	Soosi	No Design, No product development
5	Falasi	No concept of Selling and Marketing
6	Phulkari	Not clean, stained with tea, curry and dirty hands
7	Glass work, Hala Pottery	No value addition
8	Tie and dye((vegetable	Limited scope

	dyes)	
9	Block printing	Lack of uniformity, Poor quality of raw material, no design intervention,
10	Hand-made embroidery	Not clean, stained with tea, curry and dirty hands
11	Tarakahsi, tapchi	Poor quality of raw material used
12	Sindhi tanka	Quality of tanka, not as finished product
13	Makesh work	Not clean, stained with tea, curry and dirty hands
14	Khaddar	Limited market
15	Weaving fabric	Poor quality of work, not finished product
16	Hala pottery	Marketing and slow production mechanism/procedure

General challenges:

- Poor sense of design
- Rigidity on design
- Non availability of raw material
- Market shrink
- Machine as competitor
- Lengthy and slow process of manufacturing crafts
- Lack of awareness about price of the product and unfamiliarity with market price
- Week organization structure of artisans
- Poor work environment(filthy, she cooks and works at the same place)
- Non-professional attitude
- No value to time
- Commitment is not followed
- Low earning from craft works

Income of an average artisan

The income of an average artisan should be 10,000-15,000 according to government wages rule because of the amount of work they produce. But they earn much less than it. The artisans can earn more if quality and time commitment is ensured in their outputs.

An expert says, 'They are happy what they earn because they do not know the value and worth of their skills and crafts. They traditionally show contentment and do not take step forward to promote their crafts.' The other respondent says, 'Artisans are being exploited. They even do not know they are being exploited'.

Characteristics of an Artisan

According to the experts, a good artisan needs to develop sense of ownership, follow commitments and be hardworking, honest and quality conscious. H/She must know standardization and kill development. An artisans must develop personal aesthetic sense, an ability to change, keep continue learning, show flexibility and open mind.

Another expert interviewed was of the opinion, 'An artisan shows acceptance to mistakes and s/he should be money minded, not lazy and casual. S/He must avoid any short cut for example, if white color thread is not available, s/he should avoid using off white color thread, thinking that it makes no difference. But, mind you, it does make a lot of difference in the eyes of customers or bulk buyers' Another expert says, 'They make their product dirty. Their work place is filthy. The artisans are careless about the quality of their work. They do not keep the work environment clean. They use contaminated hands, stained fingers to complete embroidery work and in this way the quality of the product is categorized as low.'

The other characteristic of an artisan is he/she must have market orientation and work as professional. H/She must have correct and valid information about consumer needs, market demand, trends and fashion. H/She must love his profession and show ownership. H/She must be ambitious and have passion to move forward to learn more and more. H/She should strive to transform his/her skills. H/She must believe on cooperative learning.

Experts' Comments on Artisans and Stakeholders' Role to Support Artisans

Experts were also asked to offer their advice for, a) an artisan, b) group of artisans, c) role of government, d) role of NGOs and e) IHT itself.

Their comments/advice for each of the above are summarized below:

Artisans (himself/herself)

An artisan must have know-how about market, price, and value addition and try to get formal or informal education and training. S/He has to be independent and show mobility to market crafts and produce accordingly. S/He is to show willingness to exposure to local and international market. S/He must continuously improve skills.

Group of Artisans Working Together

The group has to choose a leader to address their issues. The chosen leaders should get know how about market requirement and about quality raw materials. The group can play effective role to develop design intervention, use of technology, assign task and craft work according to potential and skills, limitation, resources, availability, time constraint of artisans. The group can also focuses on collaboration of artisans. The group will document information about nature and types of artisans' skills, explore market trend and customers demand about design and color and quality.

Role of Government

The government can provide infrastructure, access to national and international market, allocate budget for artisans. The government can also provide health and education facility to artisans children so that they can work comfortably. Government can also arrange exhibition, cultural festivals to attract domestic and international customers.

Role of NGOs

The NGOs can link artisans to market to minimize the role of middleman and help to sell their product. In addition to it, NGOs can conduct workshop, training, exhibition and help in artisans' mobility. The NGOs can also take steps to promote regional crafts by introducing artisans to big cities of Pakistan.

Role of IHT

The IHT is to understand the cultural and limitation of artisans. The IHT can provide about the quality and availability of raw materials, color combination, design intervention, value addition, and product development. The artisans are poor about customer and middle man dealing. The IHT can also train artisans how to negotiate and deal with customers and how to sell their produce.

The IHT play important role to connect with market, develop market linkages. Another step can be taken by IHT is to develop sense of ownership and document what has been done, what is being done and what needs to be done. The IHT can help artisans make craft market oriented and salable, help them in craft recognition and bring changes in social and domestic life of artisans. Moreover, IHT can bring all stakeholders at the same page, set goals, provide platform for exhibition and display of their products and subside rate to attract customers and bring orders

Benefits of Artisans on Self-Help Basis

The experts are of the view that the self-help group can set hierarchy, organize and structure the skills of members based on their capacity, competence and performance. In this way, an environment of cooperation will be established. The artisans know one another very well about other's limitation, capacity and problems. The group will recognize artisan strength and weakness and help in capacity building by providing training one another and by helping in production. The group can also voice their rights of artisans and resultantly there will be an advocacy. One expert says that self-help group will not be formed and will succeed.

Challenges to Artisans on Self-Help Basis

The experts say that the self-help group of artisans will face threats and losing business from middleman and agents. This because the group will bargain about product price and the middle man and agent feel losing his power and pressure on artisan, so he will try to break the group and black mail the artisans. Moreover, the group needs funding to run its activities and the group members are already poor and they can finance it. There will be personal enmity, jealousy factor, favoritism and fraud among group members. In the beginning, the group will have to face managerial issue because they do not training.

Lessons from Successful Case Studies

Followings are few successful cases identified by expert who also list reasons of success in their opinions.

Sr. No	Case	Reason for success
1	SUNGI	Long term commitment, good management and expansion of business
2	Khaadi	Visibility of product
3	Baba ALLAH Dino from Bhit Shah, Hyderabad	Maintaining quality in crafts and timely delivery.
4	POLLY and ME (Chitral)	They recorded the stories of artisans and crafted on leather bags.
5	Ghulam Nabi Soomro, Younus Soomro of Bhit Shah, Hyderabad, exporting ajrak	They have branded ajrak; 'Sindh jo de ajrak'. They focus on product development. They built their capacity, they studied market demand. They followed value chain model.
6	Syeda Ghulam Batool (Janoo Wala Ahmed Pur, Bahawalpur)	Taking initiative, quality of work and production management

Apart from listing successful cases, the expert also delivered practical pieces of advice for each component of the value chain faced by textile crafts artisans.

Practical Advice by the Experts

Following are set of top three pieces of advice rendered by the experts. It is important to note that their advice totally complements the baseline research findings.

Sr. No	Value Chain Component	Practical advice
1	Market Access	Conduct workshop and exhibition for them
		Find a link to big market
		Instill pride in craftsmanship; give status of artisan craft as product
		Mobility of artisans should be without middleman,
2	Production	Use modern equipment
		Awareness/training on selection of raw material
		Ensure availability of quality raw materials,
		Improvement in natural dying procedures
3	Selling and Marketing	Orientation to market demand, trends and design intervention
		Understanding of selling and buying mechanism and giving awareness about demand and supply
		Learn how to make finished product that meets

		consumer demands and current fashion
4	Skills	Provide training on customer dealing, buying and selling product and corporate buying practices
		Training in innovation and modernity in design
		Training in packaging
5	System and standards	Train artisans about as to what system and standards mean
		Training in setting them standards of production and design
6	Quality	Conduct orientation session to train on quality standards and parameters
		Focus on standards
		Understand quality challenge
7	Soft Skills	Time management, and commitment
		Positive attitude
		Negotiation skills
		Develop professionalism in personality
		Avoid casual attitude and excuse for delay

Overall Analysis and Recommendations

This chapter highlights the key findings from each section of the survey report and gives programmatic recommendations for the same. The recommendations are also made keeping in view the parameters and objectives set out the baseline study TOR as mentioned in the Background Information above.

Socio-Economic Profile

Role of Male Family Members

The majority of the women surveyed (64 per cent) said that their male family members have no role in their personal enterprises. 25 per cent of them said that men are providing support to the women only in the purchase of the material due to cultural constraints, the fact that women are not allowed to go to the markets and safety. However, the men seem cooperative and play multiple roles to support the women through a lot of marketing, particularly in Sindh.

Business Ownership

It was found that the women are fully responsible for their businesses except in Thatta and DG Khan where men also have share in the ownership of crafts business.

Almost all the artisans of Sindh and South Punjab have the similar list of products including embroidery items, bed sheets and linen, stitched suits and bridal suits.

The stitched suits has the similar frequency in all districts except Hyderabad and Bahawalpur, where the reason could be these cities are the market hub in Sindh and South Punjab, where stitched cloths are marketed from all over the province in good price and variety.

Trends of Family Income

The artisans mostly calculate their income on monthly basis across the board (Sindh 100 per cent, South Punjab 99 per cent).

The average family income of the artisan's family is ranges from Rs. 8000 to -15000, except in Khairpur and DG Khan where it ranges from Rs. 16,000 to Rs. 21,000.

As far as the artisan's own income is concern, it ranges from 2000 to 3,700 in majority of the cases while DG Khan is again the highest at Rs. 7,000+. However interestingly crafts income makes up to 25 per cent of the family income.

Recommendations

Improved Socio-economic Conditions in Project Areas

A multi-discipline program should be started which can simultaneously improve the skills of the artisans, their exposure to the market, improved products, non-formal literacy and at the same time the program should have a longer objective or goal by working on the children (both boys and girls) of the families. They initiative will not only help children to pursue their education (formal or non-formal) but they should be involved in the family livelihood activities, which can be the similar skills of their parent with more focus on non-traditional and IT approaches.

Procurement and Backward Linkage

The three-quarter (Sindh 87 per cent South Punjab 76 per cent) of the artisans purchase the required raw material from the market. The agents also provide the material at their door steps but the ratio of this supply is higher in South Punjab (30 per cent) than the Sindh (21 per cent).

There is no such criteria or credit mechanism in these interior village of both provinces, more than 95 per cent of the artisan in both provinces purchase the raw material on cash, which shows either the self-help groups are not formed and mobilized enough to build their reputation in the market for credit supply or they are not exposed to the market and have no bargaining skills to develop this link.

To manage their home based enterprises they are depended on their family and extended family members for small loans and credits.

The agents are more active in providing finance in Sindh (100 per cent) than South Punjab (44 per cent). These agents are mainly found in Hyderabad, Bahawalpur and DG Khan which are the market hubs in these provinces, which shows finding loan and credit is more each in the cities with bigger economic activities than the smaller ones.

These loans and short term credits are usually returned between 1-3 months. There are some exception cases from 4-12 month and that too only in DG Khan.

The majority of artisans have no idea where and how to get the loan.

The information regarding process for getting loan is almost nil in all cases, except Bahawalpur where artisans do have the idea how and where to get their loan. The reason could be the NRSP's extensive network in Bahawalpur.

Artisans purchase their own raw material except in Thatta and Bahawalpur, where the male family members play an active role in the purchase of raw material. Reliance on brothers and husband is found common in both Sindh and South Punjab.

The artisans showed complete satisfaction with practices related to the purchase of raw material. Since the female members are hardly involved in the purchase of material, they don't find any dissatisfaction from it. Based on the knowledge of buying practice the top three problems were mentioned including, market distance from home, cost of raw material and wastage of time.

Recommendations

In traditional and cultural villages of Pakistan the women are mostly dependent on their male siblings, spouses and family friends to help in their purchases. Transport, security and poverty are other issues which restrict women to go out and purchase the raw material of their choices.

The project can initiate a linkage building exercise with vendors and suppliers to assess the demand at village level and have their extended shops in each village for more sales at the same rate. The project can also identify the women groups with good selling skills to operate these shops at village level for the vendors which will have the multiple benefits such as improvement in women's' selling, marketing and negotiation skills, and availability of required raw material at the door step on the whole sale price.

Example: the similar initiative was practice in Haripur where women need "Khaddar" for their traditional Justi embroidery. The vendor from "Kamalia[12]" was linked with the women and he used to collect deman on the phone and send all the required "Khaddar" thru local bus to Haripur on monthly basis and women pay the vendor thru "Easy Paisa" on delivery.

Production and Quality Control:

Majority of the artisans are involved in traditional embroidery. The Sindh is more famous in embroidery on linen and bed sheet (i.e. Ralli), the trends are changing and the Ralli work is utilized by some famous designer to use the same skill on ladies shirts. The artisans in South Punjab are known for their "traditional stitch" which are equally famous in ladies shirts and gents' kurta which is mostly embroidered on cotton shirts.

The entire artisan community of Sindh and Punjab is dependent on their collective monthly income to run their houses. It can be surmised that they neither have a daily record nor have business management skills to have a ledger and stock management to calculate daily, monthly and yearly produce and profit analysis for the growth of their business.

There was a general level of satisfaction with the usefulness of training provided. However some artisans (who received training) were not satisfied with the training they received in production and quality control. Reasons cited are: poor quality of trainers, skills not according to market and no tangible results in terms of any link with the supplier, vendor or market actors.

Recommendations

Organized Production

The artisans are involved in bed sheets, shirts and kurtas which they cannot produce more than 2-4 in a day depending on the size and design of the unit. Due to un-organized production practice this number does not go more than 5 to 9 by any of the artisan. If an organized production training is established and production chain concept is introduced to the group of artisan, will not only increase the production but the quality of products will also be increased in group production.

---

[12] *A city on Multan road know for best Khaddar in Pakistan*

The production development and product chain training can also help the artisans to produce high number with improved quality and uninterrupted supply of product to vendor in all provinces.

Use of Machine for Embroidery

As mentioned earlier, the rural villages and their female are known for their hand embroidery, the use of machine is very less in these villages. The machine embroidery is not suitable in the villages due to the bulk units in Lahore, Multan and Karachi and swear energy break down across the country.

The use of machine also not recommended by the artisans, as the embroidery they are trained can only be produce by hands which is the asset and product of the village. Another reason for not using machine is the lack of finance and skill to operate the machine and lack designing skills.

Combined products of hand embroidery and machinery can be introduced but a product development, marketing and branding efforts would be required. Since the artisans are not aware of the use of machine for the product development, they are not aware how productive this machine would be for their business. They did mention that embroidery machine would be useful but they are not aware of the use.

Product Quality & Skill Enhancement

The quality issues mentioned by the buyers to the artisan include a) delay in delivery, b) inappropriate design, not as specified, c) use of bad material and d) poor quality stitch. The issues are same across the board, and also endorsed by expert.

The women should be organized to work together for even a limited number of hours in a day, but they should work as formal workers from a specific time till specific time under standard SOPs. This can only be possible in informal groups or community production centers.

The women should be organized to work together for even a limited number of hours in a day, but they should work as formal workers from a specific time till specific time under standard SOPs. This can only be possible in informal groups or community production centers.

None of the artisans in Sindh received any training to improve backward and forward linkages.

Pass-It-On Strategy

Master skill trainers could be developed to pass on the skills in their community members. These master skills trainers not only pass on the skill to the community members but they can closely work with their artisans' family and extended family members in imparting and enhancing their skills.

Once the groups are formed, a mapping of skills should be conducted and professional and good quality artisans should be identified to head the groups and a comprehensive training program can be launched based on the requirement. One-size-fit-all strategy would not be suitable to discover talent and skills. On average it takes around 3-4 months to acquire these skills on an average level. To be a master level artisan, it needs more practice and time.

Providing the equipment, material and individual training cannot be a solution at a next stage. The community groups with similar skills should be organized, capacity assessment exercise should be held, mapping of social, marketing and management skills should be done at group level to develop a comprehensive group which can be useful at all level.

Design Intervention

Artisans' learning about the design totally depends on Friends (71 per cent), Market (43 per cent), Television is another source of information for design (35 per cent) while using Facebook is also an emerging trend (22 per cent). There is not resource center in any of the district where these women can sit together, exchange the ideas, design and collect tips for better products.

The artisan usually has their own tracing, which restricts them in design and variation. The artisans in Tharparker are most vulnerable group in terms of availability of tracing design. They are exchanging tracing with their friends only, which is another limit of design and market fashion.

The artisans are coping motifs and design to the fabric themselves through traditional transferring techniques. The use of machine or digital printing of tracing is neither available nor the artisans are exposed to usage, importance and quality of mechanical methods of tracing.

The artisans from Sindh have very limited exposure to using different needles for different work compared artisan in South Punjab. The artisan in South Punjab showed a varied understanding and difference in different needles for different embroideries. They were also able to explain the purpose of using different needles including clean work and easy stitching with respect to type of stich.

Recommendations

An artisan's product- or skill-based center in each district would be very useful for sharing experience, knowledge and cooperative bulk production. The center should be equipped with latest machines, designs, skills and tools that can improve design practices of the artisans.

This method will also enhance visibility of the artisans skills based groups, which will be great help for the designer, vendors, market buyers to visit one center for multiple skills, design and product rather visiting house to house for individual different sub-standard designs and products.

Selling, Marketing and Forward Linkages

Textile artisans are used to keeping records of sales and earing on monthly basis. They do not have difficulty in the sale of their products as whatever they produce is collected by buyers and agents at their doorsteps. It seems very convenient to artisans but at the same time, they are exploited and products are collect at a very cheap rate by these buyers. That is why they feel that they could get at least Rs 200 more than what they currently get for their crafted products.

The artisans of Sindh, especially of Khairpur, are totally not aware of the market prices and seem satisfied with the unit price they receive from the buyers, while the South Punjab's producers are well aware of the market prices and showed less satisfaction of the price they receive from the middle man.

The lack of market information, no exposure and poor craft skills is one of the main reason of getting low price of laborious work artisan do. At the same time, the exploitation by the agent is reported as one of the reason of low prices. The artisans only sell the products on low price due to convenience, laziness and lack of information of target markets. The entire groups of both provinces are eager to know the market prices for bargaining with agent.

The artisans of South Punjab are more aware of traditional marketing techniques than the Sindhi artisans. The word of mouth (79 per cent) is the highly used marketing technique than any other source of marketing. The flyer and pamphlets is the second most (40 per cent) commonly used technique by these local and rural artisans. The artisans of Muzafar Garh and Bahawalpur are found engaged in display and exhibitions in mela, cultural events and national days.

The artisans don't feel the need to advertise their products. The producers also mentioned that advertisement can be useful for the sale and promotion of their products but due to the financial constraints they never used any marketing or advertisement technique.

They still thought display center (81 per cent) is the best way to sell their products while the second most productive technique is the exhibition (43 per cent).

Since the local artisans did not used modern advertisement and marketing technique (due to low quantity of the products) they were unable to mentioned the difficulty of marketing and advertisement. The artisans who are a bit aware of the marketing techniques mentioned that Cultural constraints (45 per cent), financial issues (53 per cent) and transports (34 per cent) is the biggest constraint of marketing in their area.

Recommendations

A comprehensive marketing training program could be launched. This should be supplemented with practical marketing and promotion services at local, district and provincial levels, which would be a major breakthrough for these products (once the product are developed and multiple products are available for marketing).

The catalogs, color pallets, sample of the products would be another way of marketing and promotion of the products. The project can help the beneficiaries to develop village based product catalogs with historical background to attract the buyer with a link to history of Pakistan.

Access to Finance and Skills

Finances are not at all required by responding artisans across all Districts except Sukkur and DG Khan, where 73 per cent and 62 per cent of respondents identified this requirement of funds for themselves. The reason could be the level and quantity of their output. If they professionally operate their own business, they may need finances to upgrade and operationally sustain the business.

The issue of "interest rates" is the second highest reason for not obtaining credit from any institution. Related to this is a lack of awareness of micro-financing procedures on the part of the artisans. . The artisans of South Punjab do know some of the NGOs, including SRSO, and NRSP, but still do not want to seek micro credit due to religious reasons. In case they have to obtain a micro credit loan the NGOs are seen as the best place to seek loan. The artisans in Sindh prefer SRSO, NRSP and Thardeep RSP for micro finance while NRSP is the favourite NGO in South Punjab. Even with this information, most of the artisans are not aware of the NGOs' microfinance processes. As far the micro finance bank is concerned Asha is best known in Sindh while Islamic Banks are favourite in South Punjab.

Another reason of not obtaining loan is the loan-repayment process.

Almost none of the artisans (93 per cent) have bank account. The majority (85 per cent) of the artisan do not feel the need of having bank account.

Need for Enhancing Artisans' Skills

The artisans of the project area have learned traditional handmade embroidery skills and simple stitching techniques from their elder family members (82 per cent). Another source is self-learning when they try on their own (25 per cent) to improve their skills. The artisans of Sindh (76 per cent) had more learning opportunities than those of South Punjab (51 per cent).

The artisans showed immense need (92 per cent) to improve their skills according to market demand and needs. They identified the following key skills which may improve their business and related products.

- Quality Assurance
- Production Techniques
- Product Development
- Enterprise Development
- Marketing and Procurements
- Book-keeping and Financial Management
- Bargaining and Negotiations

The training that they have experienced was found very productive and useful.

Recommendations

Integrated Skill Enhancement

Conducing run of the mill training courses will neither be productive for the project to meet its goal or the beneficiaries to improve themselves. The skill assessment and mapping should be conducted with artisan's career planning and assessment to link each artisan's goal with the required skills.

A comprehensive and integrated course that focuses on backward and forward linkages is a must instead for the capacity building of artisans in Sindh and South Punjab.

Self-Organization

About 82 per cent of the artisans in Sindh are associated with an SHG while only 22 per cent in South Punjab are associated with a local SHG. These groups usually organize training and provide other social and technical support to the members. Some groups also reportedly arrange financial credits from the NGOs and Banks.

The artisans of both provinces (74 per cent) were excited to be a part of any SHG in their village which could provide the said support and could mentor them in strengthening their long-term livelihoods through better marketing of their textile crafts.

Recommendations

In the development history of Pakistan, many projects have established SHGs but the best practices are still not available at any meaningful level. Where such groups do exist they are mainly formed by the NGOs for their own help and communication support.

The project should showcase one SHG prior to investing on a larger scale One model SHG should be established in each province to motivate artisans to join these groups for their benefits.

The SHG should not be formed for the sake of project activity but it should have a comprehensive TOR; its performance indicators should be developed; linkages, both forward and backward, with should be established, the team and organogram of the group with JDs and SHG's person development plan should be trained, developed, monitored and evaluated on regular basis. Once best practices surface, the model can be scaled up in other areas of project intervention.

Final Words

It is hoped that this baseline will not only be a good addition to the literature on textile crafts' value chains in Pakistan but that it will also help IHT in its endeavours to increase artisanal livelihoods in the rural areas of Pakistan. The programmatic recommendations made here are meant to contribute to achieving this goal.

Annexes

Annex 1: Baseline Survey Questionnaire Tool

RANG Project, IHT

(May 25, 2015)

Screening question:

- Is your household involved in making and selling of textile crafts?
- If Yes, proceed further
- If No, end the interview and seek next

Note for the Enumerator/Surveyor:

Introduce yourself: I am ________________ from FCG Human Capital. We are doing a study for Indus Heritage Trust (IHT).

About the project: IHT's project is about large-scale commercial marketing of traditional crafts from Pakistan. This study is about finding challenges in this respect. Your expertise is the source of insights that the project would like to benefit from.

Seek Permission to interview: Information you provide will be kept confidential and will be used for the project only.

Personal Information

Name:___________________________________ Gender: M[ ], F[ ] Age: _______________________

Village: ________________ UC: _________ District: ____

CNIC:

					-								-	

Address: ____

Contact:___________________________ Email:____

A: Socio-Economic Profile

A1 Household Size:

a) *Male members* ____________________
b) *Female members* ____________________
c) *Total* ____________________

A2 Number of family members involved in textile crafts

a) *Total* ____________________
b) *Male* ____________________
c) *Female* ____________________

A3 Is your children to adopt this craft for their livelihood?

[ ] *Yes* [ ] *No, If 'No', why* ____

A4 Role played by MALE family members in textile crafts

[ ] *Buying* [ ] *Producing* [ ] *Marketing/Selling* [ ] *Other* ________

A5 Role played by FEMALE family members in textile crafts

[ ] *Buying* [ ] *Producing* [ ] *Marketing/Selling* [ ] *Other* ________

A6 Who is the head of family textile crafts business in the family?

____

A7 What is the key textile product produced by this household?

a) [ ] *Embroidery items*
b) [ ] *Stitched cloths*
c) [ ] *Bridal suites*
d) [ ] *Linen & bed covers*
e) [ ] *Apparels*
f) [ ] *Accessories*
g) [ ] *Home Furniture*
h) [ ] *Others* ____

A8 What is the average Family income during following intervals?

Interval	Family Income	Income from the Craft Work
Daily	Rs.	Rs.

Monthly	Rs.	Rs.
Yearly	Rs.	Rs.

B: Procurement and Backward Linkage

B1 Who supplies you material for making of textile crafts?

a) [ ] Buy from market
b) [ ] Supplied by the agent
c) [ ] Supplied by the buyer
d) [ ] Supplied by the community agent
e) [ ] others ____

B2 How do you buy raw material?

a) Cash
b) Credit
c) If "credit" continue; if "cash" go to question 12

B3 If CREDIT,

i. What is the current source of credit? [ ]

a. Family/Relative
b. Banks
c. Agents
d. Other ________________________________

ii. What is the payment schedule of the credit/loan? [ ]

a. 1-3 months
b. 4-6 months
c. 7-12 months
d. Year and above

iii. What is the mark up rate of the credit/loan? [ ]

a. 10% pa
b. 15% pa
c. 20% pa
d. Other (specify)

iii. What is the process to get credit/loan? [ ]

a) Guarantee, who ____
b) Collateral, what____
c) Other (specify) ____

(For clarification, enumerator asks how many rupees (10, 15, 20) they have to pay back if they borrow Rs 100)

B4 Who buys raw material for you?

a) Myself
b) Male family member
c) If male family member then
d) Husband
e) Brother
f) Father
g) Other

B5 Are you satisfied with current buying practice?

a) Yes [ ]
b) No [ ]

B6 If answer above is "NO' then why are you dissatisfied?

a) ____
b) ____
c) ____

B7 Do you face any challenges/problems in current buying practice?

Yes [ ] *No [ ]*

B8 If YES above then what are the top three problems you face:

a) ____
b) ____
c) ____

C: Production and Quality Control

C1 What textile crafts product do you produce?

a) Embroidery shirts (kurta/Kameez) for men
b) Embroidery shirts (Kurat/kameez) for women
c) Embroidered home textile (table covers, bed sheets)
d) Bridal suits

e) *Others:* ______________________________________

C2 How many units do you produce on :?

Intervals	Minimum Units	Maximum Units
Daily		
Monthly		
Yearly		

C3 What type of stitches you use in your textile craft? Please name them. Enumerators list them all

a) ____
b) ____
c) ____
d) ____
e) ____

C4 How do you produce your textile crafts?

a) *By hand*
b) *By machine*
c) *Both*

C5 If your answer is "By Hand" above, then can machines be used for your craft production?

[ ] *Yes* [ ] *No*

C6 If "Yes", Why don't you use the machine?

a) [ ] *Lack of finance*
b) [ ] *Lack of skills*
c) [ ] *don't know*
d) [ ] *Others* _________________________

C7 What type of machines do you think can be used by for your craft production?

a) ____
b) ____
c) ____

C8 What is the average production process of an average textile crafts?

Step 1: ___________________________

Step 2: ___________________________

Step 3: ________________________________

Step 4: ________________________________

Step 5: ________________________________

Step 6: ________________________________

(e.g. chaapa, embroidery, washing, pressing, packing, packaging, etc.)

C9 What is the average tool used at different stages of the craft development?

Tool 1: ________________________________

Tool 2: ________________________________

Tool 3: ________________________________

Tool 4: ________________________________

Tool 5: ________________________________

Tool 6: ________________________________

(blocks, machine, washing machine, sealer, etc.

C10 Are you aware of quality issues that your buyers highlight?

[ ] Yes *[ ] No*

C11 If YES above, then what are the top quality issues highlighted to you?

a) Lack of consistency
b) Bad craftsmanship
c) Not according to design
d) Not according to fashion
e) Delay in delivery of work
f) Bad material used
g) Others ____________________________

C12 How can the quality issues be addressed?

a) Skill building of artisans in new production methods
b) Skill building of artisans in quality enhancement
c) Use of better tools and material

d) *Improved understanding of customer requirements*
e) *Better linkages with customers*
f) *Others________________*

C13 Have you received any training before in production and quality of textile crafts?

[ ] Yes *[ ] No*

C14 If YES above then

a) *From which organization______________________________________*
b) *For how long____*

C15 How did you find the training?

a) *Very useful*
b) *Little useful*
c) *Not useful*

C16 If your answer is "little or not-useful" then what was the reason?

____

D: Design Intervention

D1 Where do you learn about the new fashions and trends?

a. *Friends*
b. *Market*
c. *TV / Electronic Media*
d. *Magazines & Design Books*
e. *Internet / Face Book pages ____*
f. *Others ____*

D2 Where do you get the designs for tracing?

a) *I draw myself*
b) *From Market*
c) *Internet*
d) *Others ____*

D3 How do you transfer motive from tracing sheets to Fabric?

a) Neel
b) Zinc
c) Chock
d) Other ____

D4 Who do the tracing for you?

a) Yourself
b) Shopkeeper
c) Other ____

D5 Which needles you are mostly used?

Size ________________________ Why _____________________________

D6 Which type of threads you mostly used ?

Brand ______________________________ Why _______________________

D7 What are the washing process after embroidery?

Step 1: ____

Step 2: ____

Step 3: ____

D8 What are the main component of your embroidery tool kit?

a. ____
b. ____
c. ____
d. ____
e. ____
f. ____

E: Selling, Marketing and Forward Linkages

E1 How many units do you sell in the market?

____________________*units*

Enumerators insist of a number for Question above, otherwise ask this question:

Number of textile craft items sold in year:

a) [ ] up to ten
b) [ ] between 10 and 20
c) [ ] between 20 and 30
d) [ ] More than 30
e) [ ] others ____

E2 Who sells your product in the market?

a) *Myself*
b) *Buyer/customers get it from doorsteps*
c) *Agents sell it*
d) *Male family member*
e) *Others*

E3 At what price do you sell your one unit of you product?

______________*rupees*

E4 Do you get a FAIR price for your textile crafts products?

[ ] Yes *[ ] No*

E5 If NO, then how much should you get?

____________________*rupees*

Enumerators insist on getting an answer to above, if respondents struggle to name price, then use the offer the following options:

a) *Rs 50 more than current price*
b) *Rs 100 more than current price*
c) *Rs 150 more than current price*
d) *Rs 200 more than current price*

E6 In your opinion why don't you get a fair price?

a) *Market price information not available*
b) *Cannot negotiate with buyer/agent*
c) *Urgently need money back for family*
d) *Others* ____

E7 Do you know the price at which your product is FINALLY sold in the market?

[ ] Yes *[ ] No*

E8 If YES above, then why do you think it sells for that much price in the cities?

a) *Because of better marketing by city shopkeepers*
b) *Because of convenience to customers*
c) *Because of other reasons*_____________________________

E9 If 'NO' above then, would you like to know the final market price?

[ ] Yes *[ ] No*

E 10If you know the final market price, how will you use this information to your benefit?

____

E11 Do you use any advertising for your textile craft products?

[ ] Yes *[ ] No*

E12 If YES above then how?

a) Pamphlets/brochures
b) Newspaper ads
c) Outdoor ads
d) Word-of-mouth
e) Event and exhibition
f) Bachat Bazars
g) Social media
h) Radio
i) TV
j) Others

E13 If NO above, then why not?

a) There is no need for advertising
b) Have no money for advertising

E14 Do you think adverting will help you get more business and customers?

[ ] Yes *[ ] No*

E15 If YES above then suggest TWO best methods for advertising your products:

____

____

E16 Do you face any difficulty in better marketing your products?

[ ] Yes *[ ] No*

E17 If YES above, then what are your top three problems related to marketing?

____

____

____

____

F: Access to Finance and Skills

a. Finance

F1 In order to grow your crafts business, would you like to get credit from the banks or financing institutions?

[ ] Yes [ ] No

F2 If NO, then why not?

____

F3 If YES, then do you know the procedure for getting micro-credit?

[ ] Yes [ ] No

F4 If NO above then would you like to know about the procedure for getting micro-credit?

[ ] Yes [ ] No

F5 Do you know an institution (Bank, NGO) that give credit to artisans like yourself?

Name_____________________________

Don't Know

F6 If you want credit for your craft business than which institution would you prefer?

[ ] NGOs ___________________ [ ] Micro Credit Institution _________________

[ ] NRSP __________________ [ ] Bank _________________

F7 Do you know any NGO providing micro-finance in your area?

[ ] Yes (Name the NGO)____ [ ] No

If 'Yes, are you satisfied with the loan disbursement and re-payment process?

[ ] Yes [ ] No

If 'No,, Explain ____

F8 What credit tenure would you prefer?

[ ] Months

F9 What are the issues in getting micro-credit?

a) *Lack of information about the micro-credit institutions*
b) *Lack of information about the rules and procedures*
c) *Lack of collateral assets*
d) *Other (specify)*

F10 Do you have a bank account?

[ ] Yes *[ ] No*

F11 If "No" above, then why not?

a) *Don't know how to open an account*
b) *I don't need it*
c) *There is no bank nearby*

b. Skills

F12 Where did you learn this skill? [ ]

a) *Family members*
b) *Government's technical Institution*
c) *NGOs skills training programs*
d) *Self- learned*
e) *From community masters (ustad in community)*
f) *Other* ___________________________________

F13 What is the best source of learning this skill/craft? [ ]

a) *Family members*
b) *Government's technical Institution*
c) *NGOs skills training programs*
d) *Self-learning*
e) *From community masters (ustad in community)*
f) *Other* ___________________________________

F14 Do you think you require more skills for improving your livelihood from your textile craft ?

[ ] Yes *[ ] No*

F15 If yes above, then what skills or competencies would you like to have? [ ]

a) *Modern production techniques*
b) *Quality assurance and enhancement*

c) *Enterprise development/ running a business*
d) *Marketing and selling*
e) *Book keeping, costing and pricing*
f) *Product development*
g) *Bargaining and negotiation*

F16 Have you received training in any of the above before?

[ ] Yes *[ ] No*

F17 If YES, then did you find the training useful?

a) *Very useful*
b) *Little useful*
c) *Not useful*

F18 If your answer is "little of not useful" then please explain why:

____

F19 From which organization and for how many days did you get the training in above?

*Organization*______________________

*Days of training*__________________

G: Self-Organization (Self- Help Group and Artisan Council)

G1 Do you know of any self-help group (SHG)?

[ ] Yes (Name it) ____ *[ ] No*

G2 If 'Yes', are you a part of any SHG?

[ ] Yes *[ ] No , Why* ____

G3 What does this SHG do?

____

____

____

G4 Do you think if village/area artisans organize on self-help basis it will improve your work and income?

[ ] Yes *[ ] No*

G5 If artisan's self-help group is formed, would you like to be a member of this group?

[ ] Yes *[ ] No*

G6 If NO then why not?

a) *It is not helpful*
b) *It is a failed concept*
c) *Wastes time and energy*
d) *Others*_______________________________

G7 If YES, then what would be your expectations from artisans' self-help group? It should…

a) *Arrange credit*
b) *Build your skills*
c) *Negotiate with agents and buyers*
d) *Provide market trends and information*
e) *Others*__________________________

G8 What would be the major challenges and problems, if a self-help group of artisans is organized in your village/are?

a) ____
b) ____
c) ____

-------- End --------

Annex 2: In-depth Interview (IDI) Guide

RANG Project, IHT

(May 20, 2015)

Duration: 60-90 min

Respondents: Experts and knowledge bearers in craft business

Objectives of in-depth interview are:

- To glean experts' insights into issues related with value chain of crafts
- To extract relevant factors/variables for inclusion into baseline survey on issues faced by artisans in commercial production of their crafts.

Note for the interviewer:

Introduce yourself: I am ________________ from FCG Human Capital. We are doing a study for Indus Heritage Trust (IHT).

About the project: IHT's project is about large-scale commercial marketing of traditional TEXTILE crafts from Pakistan. This study is about finding challenges in this respect. Your expertise is the source of insights that the project would like to benefit from.

Seek Permission to record: Information you provide will be kept confidential and will be used for the project only. With your permission I will record this conversation.

IDI Questionnaire and Probes

1. What are the top five challenges faced by the crafts industry in Pakistan? (Probe the reasons for Sindh and Punjab)
   a. ____
   b. ____
   c. ____
   d. ____
2. Are you familiar with textile crafts of _________ (ask for respective province Sindh and South Punjab)?
   Yes [ ] No [ ], *If "Yes", please specify*

Sr.	Sindh	South Punjab
1		
2		
3		
4		
5		

3. Do you think these textile crafts can be marketed commercially in local and foreign market?

   a. Yes, How ____________________

   b. No, Why ____________________

4. Which of the above textile crafts you listed have demand in local market? Which in the foreign market?

Sr.	Crafts for Local Market	Crafts for Foreign Market
1		
2		
3		
4		
5		

5. What is the reason for local and foreign market demand?

Sr.	Reasons for Local Market Demand	Reasons for Foreign Market Demand
1		
2		
3		

4		
5		

6. Are enough textile crafts being produced as per the local and international demand?

Yes [ ] *No [ ]*

7. If no, then are the production issues of textile crafts
   - [ ] *Quality of product is no good*
   - [ ] *Quantify of the products is not sufficient*
   - [ ] *Don't have good quality skills as per market demand*
   - [ ] *No resources for bulk production*
   - [ ] *No information about the market trends*
   - [ ] *No information about new design*
   - [ ] *others* ____

8. What are the top five challenges that artisans of the textile crafts face in Sindh and South Punjab?

Sindh		
Sr.	**Crafts**	**Challenges**
1		
2		
3		
4		
5		

South Punjab		
Sr.	**Crafts**	**Challenges**
1		
2		
3		
4		
5		

9. The key objective of IHT project is to increase the income of textile artisans of Sindh and South Punjab. How much do you think is the current income of an average artisan in Sindh and South Punjab? (Insist on an educated guess)

Income Bracket *(Rs per month)*	**Sindh**	**South Punjab**
< 5000		
5001 – 10000		
10001 – 25000		
> 25000		
Other Specify		

10. How much can a good textile artisan earn per month?

    Rs. ____________________________ */month*

11. How? ____

12. What must he/she do to get better income? ____

13. Please define "a good textile artisan" A good artisan is ____

Question Cues:

14. What skills a good artisans should have? ____

15. What attitude should a good artisan possess? ____

16. What are attributes s/he should not have ____

17. In order to increase the income of textile artisans, what step do you think should be taken by

Sr.	Stakeholders	Step
1	Artisans (himself/herself)	
2	A Group of Artisans Working together	
3	Government	
4	IHT Project	
5	NGO Partners	

18. If artisans organize on self-help basis, do you think it will benefit them?

    Yes [ ] *No [ ]*

    Why ____

19. What challenges do you think they will face?

    a. ____
    b. ____
    c. ____
    d. ____
    e. ____

20. Do you know of any successful case studies in textile crafts marketing to local and overseas customers?

    a. Name please ______________________________

    b. Reason of success:

    i. ______________________________
    ii. ______________________________
    iii. ______________________________

21. What is ONE thing that if achieved by Indus Heritage Trust will make you rate the project successful? Why this is important?

____

____

____

22. What practical advice can you give to an artisans' group in order to improve their…

Sr.	Value Chain Components	Practical Advice
1	Market access	
2	Production	
3	Selling and marketing	
4	Skills	
5	Linkages	
6	Systems and standards	
7	Attitudes and behaviours	
8	Quality	

Note for interviewers:

Use the following table to provide further information to the respondents in case they ask what is meant by any of the above headings:

Their market information	
	Market information and trends
Their production	
	Production techniques
	Products enhancement
	Use of technology

Their selling and marketing	
	Marketing and promotion (social media)
	Social media marketing
	Packing and packaging
	Exhibitions and Melas
Their skills	
	Selling and marketing skills
	Negotiation & Bargaining
	Entrepreneurial skills
	Pricing and costing
Their linkages	
	Access to finance
	Backward linkages (raw material suppliers,
	Forward linkages (agents, buyers, customers
Their system and standards	
	Procurement
	Inventory Control

Annex 3: Villages Surveyed

Villages/ Union Council marked in bold indicates places included in the Baselin Survey

Villages Surveyed in South Punjab	
District	Village/UC
Bahawalpur	**UC Jindo Misson**
	Village of Jindo Misson
	Village of Jindo Misson
	UC Miani
	Ahmad Pur East City
	Dara Nawab Sahib
	04 BC
	37 BC
	Abbas Nagar
	Basti of Abbas Nagar
	Basti of Abbas Nagar
	Dera Bhakha
Lodhran	**Hassan Wala**
	kehror Pakka
	Pathan wala
	Basti Kumharaan
	Marham Wala
	Baalay ki hatti
	Gheer Basti
	Dr. Ameer wali gali
	Dhanot
	Jalla Araeen
	Lodhran City
Vehari	**Imam Abad – Mailsi**
	Mouza Kikri
	Mailsi city
Muzaffar Garh	**UC Baseera**
	Basti Soo Wali
	UC Sharif Shajra
	UC Gull Wala
DG khan	**Choti**
	Sooker

	Shah ki Basti
	Basti Foja
	DG Khan
	Jhok Utera
	Basti Reekra
	Taunsa Shareef

Villages Surveyed in Sindh	
District	**Name of Village/UC**
Khairpur	Agha Khan jatoi
	Shoaib rind
	Hameed Abad
	Mang Tagar
	Lal Bux Tagar
	M.Hayat Shaikh
	Pir Bux Solangi
	Gabar Metlo
	Sabal jagirani
	Pir Mangio
	Badlani Shaikh
	Utera
	Gindal Solangi
	Nihal solangi
	Allah Rahkio Shaikh
	Ali Abad
	Moosa Rajper
	Shah rasheed
	Gahno Bhagat
	G.Rasool Hesbani
	Khalifa
	Kenjhar
	Anmb Sharif
Tharparkar	**Name of Village/UC**
	Aaho Meghwar
	Tobhario
	Detha Bheel
	Warhoon Bheel
	Nuhto
	Godhiar
	Bhope jo tar

	Soore jo tar
	Railo Rind
	Khakhnihar Raheem ali
	Lalwani paro
	Harijan paro
	Nijar Paro
	Meghani paro
	Chelani paro
	Darelo paro
	Chibhrial
	Sooja very
	Sringhwari
	Morantali
	Mithi 1 Dhamani Colony
	Mithi 2 Thar Murk Colony
	Mithrio Bhatti
	Jhapio
	Nenisar
	TabhoMeghwar
Thatta	**Name of Village**
	Abdul Qadir Lashari
	Izat Khan Lashari
	Haroon Lashari
	Bsham Khan Lashari
	Haji Abdul Karim Lashari
	Haji Arab Lashari
	Gul Muhammad Shoro
	Yameen Shoro
	Achar Shoro
	Moriyo Shoro
	Natho Samjeo
	Allah Dino Samejo
	Khamo Shaikh
	Achar Kheero
	Abdullah Deniyo
	Saleh Mohammad Koddan
	Muhammad Ali Koljan
	Abdullah Koddan
	Pirano Lashari
Sukkur	**Name of Village**
	Mandedero
	Patni

	Nandi Patni
	Sodo Khan Sarwari
	Long Bhatti
	Najamudin
	Imdad Mirani Goth
	M. Yousif Ibopoto
	Rahooja Colony
Hyderabad	**Name of Village**
	Karan Khan Shoro
	Bagrani Goth
	Subhanallah Colony
	Village Soomar Mallah
	Tando Hyder
	Bahawal Zounr
	Tando Saeed Khan
	Molidino Mirbahar
	Tando Bahawal
	Tando Fazal

Annex 4: Name List of Stiches Used

A **TANKA** is a stich that textile artisan use to create their embroidery. Each **tanka** or stich is different and distinct and most are invented locally us that the locality becomes known for a particular type of embroidery based on that **tanka** or stich. Each stich has a localized name. The following list provides the names of stiches found in the survey and the categorization used to present them in Figure 27.

C3-What type of stitches you use in your textile craft	Categorized as:
Base:All Respondents	Local name
Kanch tanka	Local name
Kacha paka tanka	Local name
Hor moch tanka	Local name
Benazeer tanka	On politician/celebrity
Mokesh tanka	Local name
Maky wala tanka	Local name
Kawa tanka	Local name
Madhoori tanka	On politician/celebrity
Erani ownd	Local name
Motti tanka / kardhai	Local name
Sindhi tanka / kardhai	Ethnic brand
Sheshy lagana	On material name
Kachi kardhai	Local name
Qureshia	Local name
Kala batto ka kaam	Local name
Kacha tanka	Local name
Kashmeri tanka	Ethnic brand
Balochi tanka / kardhai	Ethnic brand
Chikan	Animal name
Kanwas tanka	Local name
Gulab tanka	Ordinary name

Sedha tanka / kardhai	Ordinary name
Quntry Kardhai / tanka	Ordinary name
Rainten stand tanka	Ordinary name
Nag lagana	Local name
Zari tanka	On material name
Arki kardhai	On material name
Dainti tanka	On material name
Qanti tanka	Local name
Kachi sowhi	Local name
Zanjeri kardhai	Local name
Gobhi tanka	Local name
Zanjeri kardhai	Local name
Nawaz shareef tanka	On politician/celebrity
Paaki sowi	Local name
Komal	Local name
Nawaz shareef tanka	On politician/celebrity
Kanch kardhai	Ordinary name
Paaki sowi	Local name
Paka tanka	Local name
Baart tanka	Local name
Kaprdhy par astar lagana	Local name
Botti tanka	Local name
Tejarti tanka	Ordinary name
Shesham ki kardhai	Ordinary name
Zanjera tanka	Ordinary name
Sepo (print ke oper ki jati hay)	Ordinary name
Sitary	Ordinary name
Alla ka kaam	Ordinary name
Sada tanka	Ordinary name

Chen tanka	Local name
Mokh tanka	Local name
Ankhen ka tanka	Local name
Oramchi	Local name
Phool tanka	Local name
Machli tanka	Local name
Took ka kaam	Local name
Kattor ka tanka	Local name
Khark ka	Local name
Kharnchi	Local name
Neel	Local name
Farwah	Local name
Soof	Local name
Gantri	Local name
Soof	Local name
Katahi	Local name
Hakam	Local name
Dhaga	Local name
Sohi	Local name
Bharai wala tanka	Local name
Goli tanka	Ordinary name
Goli tanka	Ordinary name
Sheed tanka	Ordinary name
Machine kardhai	Ordinary name
Kacha motti	Ordinary name
Muqeesh kardhai	Ordinary name
Kacha motti	Ordinary name
Tarkashi tanka	Ordinary name
Muqeesh kardhai	Ordinary name

Naqshi damki	Ordinary name
Char sohi tanka	Ordinary name
Do sohi tanka	Ordinary name
Golad kinari	Ordinary name
Work pola waghera	Ordinary name
Golad kinari	Ordinary name
Banarsi tanka	Ordinary name
Work pola waghera	Ordinary name
Andha chonjla tanka	Ordinary name
Saib tanka	Ordinary name
Poli kardhai	Ordinary name
Utri kardhai	Ordinary name
Makrdi tanka	Ordinary name
Printing work	Ordinary name
Theky ka kaam	Ordinary name
Oung ki kardhai	Ordinary name
Kinari tanka	Ordinary name
Israng tanka	Ordinary name
Sheed work / tanka	Ordinary name
Gul haredi	Ordinary name
Reaty	Ordinary name
Sheed work / tanka	Ordinary name
Overlock	Ordinary name
Pecko	Ordinary name
Laenzi deszi	Ordinary name
Daby tanka	Ordinary name
Chawal tanka	Ordinary name
Ahmed pori tanka	Local name
Chawal tanka	Local name

Bhandwa tanka	Local name
Sanhal tanka	Local name
Ribben ka kaam	Local name
Bhandwa tanka	Local name
Dabka	Local name
Sanhal tanka	Local name
Resham tanka	Local name
Har qisam kay tanky	Local name
Chota tanka	Local name
Khajoor tanka	Local name
Morsi tanka	Local name
Resham tanka	Local name
Soraj tanka	Local name
Har qisam kay tanky	Local name
Sandi	Local name
Hali dhaga	Local name
Kori tanka	Local name
Tala	Local name
Adhy ka kaam	Local name
Cross tanka	Local name
Machis tanka	Local name
Adhy ka kaam	Local name
Motorway	Local name

Annex 5: List of Experts Interviewed

IHT IDIs Respondents

Sr. No	Name	Designation	Organization	City
1	Sarah Faruqui	Director	Koel	Karachi
2	Shakeel Abro	Regional Coordinator, Sindh	AHAH	Hyderabad
3	Rizwan Beyg	CEO	Fashion Designer	Karachi
4	Umer Saeed	CEO	Fashion Designer	Karachi
5	Shehnaz Ismail	Professor	Indus Valley	Karachi
6	Ms Naheed	Principal	Government Women Vocational Training Centre, New Karachi	Karachi
7	Naveed Sheikh	Manager Marketing and Product Development	AHAN	Lahore
8	Daanish Khan	CEO	Kaarvan	Lahore

References

- Directorate of Industries, Punjab (2009), Pre-Investment Study of District Multan
- Inter Cooperation, Pakistan (August 2009), Value Chain Analysis of Livestock Sector (Dairy) in District Vehari , Punjab,
- Khan, Waqar Ahmad, and Zeeshan Amir. "Study of Handicraft Marketing Strategies of Artisans in Uttar Pradesh and Its Implications." *Res. J. Management Sci* 2.2 (2013): 23-26.
- Jones, Linda, and Perveen Shaikh. "MEDA ECDI Market Assessment Report "For the Small Enterprise Education and Promotion Network Practitioner Learning Program, Washington DC (2003).
- Multan, Cultural Assets in Districts. "Empowering Women through Crafts"
- Quddusi, Iqbal Saba, (2011), What has Stagnated the Growth of Potters of Multan? A Bachelor Thesis, Department of Fine Art Indus valley School of Art and Architecture, Karachi Pakistan
- Sungi Development Foundation (2013)Annual Report 2012-2013, Creating Opportunity for Skilled Artisans and Workers, Islamabad, Pakistan
- Shaikh, Anam. "Reviving the Sindhi Craft"
- Bukhari, Shahzad and Fariduddin, Shadab, 2014, Five Value Chain Studies in District Chitral, Thrive Islamabad