

STRENGTHENING INDUSTRY VALUE CHAINS

COMPETITIVENESS AND POVERTY

ALLEVIATION IN

'TEXTILES' CLUSTERS IN INDIA



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FOREWORD



The Indian textiles (and clothing) sector is witnessing interventions in scores of industrial and artisan clusters. The institutions involved in interventions include: the Textiles Committee - a pioneer, several Central and State Government institutions and agencies such as those under the aegis of the DCSSI such as NISIET and SISI. EDI, IL&FS, and various offices of the Ministry of Textiles, Technical Consultancy Organisations and Entrepreneurship Development institutions, and also the Handlooms Department of State Governments.

While UNIDO has been catalysing pioneering interventions, several other international organisations such as the DFID, GTZ and the World Bank – SIDBI-WB Project Management Division are also progressively supporting cluster based interventions.

Many ongoing interventions are being pursued through a catalyst – A Cluster Development Agent (CDA).

This agent serves as a facilitator/catalyst encouraging cluster value chain Micro, Small and Medium Enterprises (MSMEs) to pursue joint initiatives and also effectively reap available agglomeration economies.

A CDA converts hitherto 'passive clustering' to 'active clustering' in Indian clusters. S/he facilitates evolution of consortia amongst SMEs and SPVs of their associations. S/he strives to facilitate protection of clusters from spurious competition.

A critical reason for a poor track-record of interventions in some 'textiles' clusters is the dearth of adequate frames of reference and checklist of appropriate diagnostic and interventional tools. This volume serves to plug these lacunae.

Textile enterprises in India, today, are experiencing challenges and opportunities with the onset of globalisation and reducing tariff barriers in the WTO regime.

Micro and Small Enterprises (MSEs) in handlooms and woven garment manufacture, in particular, are experiencing severe competitiveness threats.

Handlooms experience threats from powerloom fakes from different locations in India, while powerloom enterprises experience threats from fabrics of countries like China.

The future of hundreds of thousands of the industrial labour force as well as artisans is at stake. This handbook draws from the experience of the Textiles Committee and other developmental institutions and seeks to provide appropriate frames of reference (illustrations on successful interventions) and some relevant tools for appropriate interventions in different clusters.

Though focused on the textile sector value chain, the concepts, tools and instruments presented in this volume is also generic in many ways. They are applicable to a wide range of value chains and clusters in a Developing Economy like India.

Experiences from interventions worldwide indicate that one should not myopically work in clusters ignoring value chain actors who may be dispersed across the Nation (National Value Chain). *The*

authors emphasise on need for appropriate mapping of cluster value chains (intra cluster, National and global value chains) is an aspect that policy makers and practitioners need to give utmost consideration.

I congratulate the authors V.Padmanand and D.P. Jadeja in their efforts to pen down their own field experiences and also learning gleaned while intervening for MSME development in India and abroad.

I also commend the dynamic CDAs and institutions who have taken the lead in pursuing sincere interventions in India and wish future CDAs the very best in their Nation building activities - without a competitive industry there is no strong economy or option to resolve poverty issues in our country.

I would also like to place on record my appreciation of the keen interest of the Textiles Committee in bringing out this volume for benefit of the Indian industrial economy.

This book will help MSME policy makers and practitioners in India and other developing countries adopt a more professional & appropriate approach over cluster value chain selection, diagnosis and intervention.

Mumbai
October, 2007

Smt. Krishna Gahlawat
Chairperson, Textiles Committee

PREFACE



The 'textiles' sector in India may be broadly categorized into two segments viz. the industrial segment and the artisan/handloom segment.

The sector comprises the organized cotton/man-made fibre, textiles mill industry, man-made fibre/filament yarn industry, wool and woollen textile industry, sericulture and silk textiles industry, handlooms and handicrafts, jute and jute textiles industry.

Related value chain participants include machinery and accessory manufacturers, dyes and chemicals units etc. The production of cloth is by all key segments viz. powerloom, handloom, wool and silk and hosiery and Khadi.

Textiles exports from India stood at 17 billion USD in 2005-6. It had registered an increase of 22 percent over the previous year. The handlooms segment produces about 6108 million mts. of cloth (2005-6). The handicraft segment provides employment to about 63.81 lakh artisans.

The industry is critical to the National economy accounting for nearly 14% of total industrial production and about 27% of foreign exchange earnings. It is amongst the highest employment provider providing employment to over 20% of the work force in the country. It therefore contributes significantly to the country's growth, employment situation and circumstance in terms of industrial competitiveness.

The enterprises in the sector are agglomerated as clusters across the country. Many of them are confronted with severe challenges with the onset of 'globalisation' and reducing tariff barriers in the WTO regime.

Growth of an economy is also believed critically dependent on domestic and foreign investment levels and on various factor and other conditions that determine the Incremental Capital-Output Ratio (ICOR) in an industrial economy. Investment will be forthcoming and made only with confidence in industry growth and competitiveness. The role of competitiveness oriented interventions becomes critical in this context.

This volume is meant to serve as a handbook for practitioners in the field as well as for Implementing Agencies in cluster and value chain analysis and development. The hundreds of practitioners – viz. Cluster Development Agents (CDAs) as well as Technical Advisors (TAs) typically experience several information/knowledge and skill gaps. The value chain approach is incorporated for highlighting interventions made as well as those necessary to ensure that Indian Textile enterprises are sustainably and competitively integrated into regional and global value chains.

In this context, the volume presents both the appropriate conceptual underpinnings and also the methodological tools for interventions in clusters with global competition and the value chain in perspective. Several clusters may deal with relatively non-tradeable products – reference is also made to such.

The 'clustering' phenomenon is widespread in India. *In India, a cluster is typically defined as a geographical agglomeration of MSEs producing and offering a similar or related product or service.*

However, while specialisation in specific value activities is evident in single clusters, the value chain invariably extends to enterprises/clusters in other places. It is therefore necessary to consider and intervene in the overall national value chain to facilitate competitiveness of the final product /service. *Therefore, a cluster value chain approach in terms of diagnosis and interventions assumes importance.*

Porter (2000) stresses that clusters cannot be understood independent of broader competition and competitive strategy in a global economy.

In India, core enterprises involved in different value generating activities in the textiles sector are agglomerated as clusters. *Hence, the focus of analysis and interventions will be on cluster value chains (including intra-cluster value chains, regional and National value chains).* However, in some Developing Countries, this phenomenon of geographical agglomeration may not prevail. In such circumstance, 'sub-sector (value chain)' based study and interventions will be appropriate.

Part I of the volume presents basic concepts on growth and competitiveness:

Chapter 1 in this part elaborates on competitiveness in textile clusters and its relation to Indian economic growth. The relatively integrated (within the National value chain) nature of the textiles sector is highlighted and means for studying country and sectoral competitiveness specified. Chapter 2 presents approaches to economic growth theories as applicable to resource poor developing countries. The chapter also introduces the underpinnings, importance and definitions of clusters, value chains and extended cluster (product sub-sector) value chains in India.

Part II of the volume presents the approach to the cluster based value chain analysis and intervention methodology:

Chapter 1 of Part II introduces the reader/user of the volume to serves as an introduction to the approach-diagnosis and intervention mode and the catalysing facilitator (the CDA). Chapter 2 summarises the competitiveness/sustainability analysis and selection of value chains, and thereafter, related clusters. Chapter 3 covers mode of conducting a cluster value chain (intra cluster, National and international value chain) study, its components and basic parameters. It also includes a basic *format/checklist of relevant analysis/study report*. Chapter 4 encompasses options for identification of constraints/gaps and evolving a validated vision and action plan. Case illustration of the apparel value chain interventions in in other Developing Countries is also presented. Chapter 6 presents the methodology of implementing a value chain strengthening/restructuring plan. Critical aspects such as launching and the phasing of implementation are also covered. The subsequent chapter introduces monitoring and evaluatory parameters, cues and illustrative formats.

Part III presents the success stories on interventions:

Many of these have been catalysed by the Textiles Committee.

Chapter 1 presents critical interventions in industrial clusters: Solapur, Tirupur, Madurai; chapter 2 presents interventions in artisanal (Handloom) clusters: Kannur, Karur and Pochampally

Part IV of the volume presents instruments and tools to facilitate intervention:

Many interventions indicated in chapter 1 of this part of the volume have been led by the Textiles Committee with Technical Advice from the authors. Some interventions discussed include:

- Encouraging FDI and technology transfer – Attracting value chain players from other countries.
- Facilitating outward FDI – A strategic initiative

- Networking with international BDS providers - Netherlands Management Co-operation Programme [NMCP] / PUM
- Establishing ties with trade authorities of different countries to facilitate equipment/technology sourcing/FDI-Joint Ventures etc.
- Evolving ideal credit instruments for MSEs
- Targeting credit needs of micro enterprises through group finance (Non - MFI/SHG route)
- Institutionalising training interventions
- Business management/Enterprise Resource Planning (ERP) options – also strengthening intra-enterprise supply chain
- Establishing a b2b portal / tying up with relevant service providers
- Competitive import of certain critical inputs from other players in the global value chain
- Promoting Micro Finance Institutions (MFIs) and instruments particularly targeting existing / new micro enterprises and clusters
- Registering cluster uniqueness and historical recognition under the GI Act
- Consortia and SPVs of cluster enterprises and chalking out appropriate business plans
- Appropriate constitution of consortia and SPVs
- Promoting Business Development Services (BDS)
- Facilitating interventions of BDS providers on the (large) physical infrastructure front
- Generation of new MSMEs in clusters – also as a tool to promote employment generation
- Establishing Cluster Business Information Centres (CBICs)
- Establishing Sub-Contracting Exchanges (SCX) in clusters
- Preparation of DPRs for CFC and physical infrastructure to be established on a PPP mode
- Raw material banks
- Evolving market consortia
- Interventions on the power and energy front for competitiveness
- Enhancing services offered by industry/artisan associations

The subsequent chapter in this part presents interventionary instruments at the National policy/institutionalisation plane- selection of sub-sector/cluster value chains in the Indian context. The schemat for National implementation – The institutional framework, as is prevailing in India is also presented.

The volume presents indicative/ developed case illustrations from several Sub-Saharan, North African-Arab region as well as South and East Asian countries. The authors have been directly involved in pursuing most of the initiatives presented in the volume. While some essential concepts and tools have been drawn from UNIDO and ILO approaches, the usual disclaimer applies.

It is the fervent belief of the authors that dynamic CDAs and Technical Advisors working on cluster and MSME development will find the volume of use to pursue meaningful and more rigorous interventions in clusters.

Mumbai
October, 2007

J.N. Singh, IAS
Textile Commissioner

ACKNOWLEDGEMENTS

At the very outset we would like to humbly thank all the policy makers and implementers (and, the sincere, honest and hard-working never-say-die CDA) for their dedicated efforts in developing MSME clusters in the Indian sub-continent.

The visionary leadership of Ganesh Kumar Gupta and Nayan Parikh, former Chairmen, as well as that of Smt. Krishna Gahlawat Chairperson, Textiles Committee had catalysed the changing role of the Committee as a facilitator. We thank them sincerely.

We would also like to place on record our appreciation of the leadership assumed by Harsharan Das, Secretary, and Rajiv Aggarwal, former Secretary, Textiles Committee, who have ensured the sustainability of Textiles Committee interventions towards evolving a globally competitive Indian textile industry with a 'human face'.

The visionary leadership of Hon'ble Union Textile Minister Sankarsinh Vaghela has served as morale boost for all the MSME development interventionists. The catalytic support of proactive A.K. Singh, Secretary (Textiles) has proved to be path breaking.

B.K. Sinha, Development Commissioner (Handlooms) has served as the dynamic stalwart of cluster development initiatives in the handloom sector. We would also like to formally place on record our sincere appreciation of his contribution to the Indian handloom industry.

We would specifically like to place on record our admiration of the initiatives of S.B. Mohapatra, S.K. Tuteja, Smt. Anita Das, Subodh Kumar, Amir Subhani, A. Dasgupta, Christy Fernandes, Jawahar Sircar, P.H. Kurian, G.S. Gangwar and R.C.M. Reddy (dynamic former Secretary of the Textiles Committee) officers of the Indian Administrative Services. They have also ensured that the Central Government as well as several State Governments progressively catalyse interventions on a cluster mode.

The role of Mukesh Gulati and the UNIDO team in India have been pioneering. Guidance from the expert UNIDO team in Vienna has certainly been pivotal in this context. We would also like to express our gratitude to Dinesh Awasthi and Chukka Kondiah heads of Entrepreneurship and cluster development institutions who have played a key role in institutionalizing cluster and SME interventions at the National plane.

The contribution of the pro-active officers of the Committee – Nadiger, Naik, Mandal, Gorakhia, Ulaganathan, Pankaj Malik, Jeeva, Persiasamy, Unnikrishnan, Velmurugan, Barman, R.N. Ram and Bailur deserves special mention.

Sathya's co-ordination from Textiles Committees side over preparation of drafts of this volume is gratefully acknowledged.

Last, but hardly the least, we would like to acknowledge and appreciate the sincere interventions of dynamic and 'seasoned' CDAs such as Rajan, Venugopal, Kopresachari, Ramesh Babu, Sauman Mapdar, Veluchamy, Dhanapal, Abdul Rasheed, Y.V. Rao, B. Tiwari, Subbiah, Raman Sivakumar, Machiraju, Dhandapani, Alman and for their contribution to the development of the Indian industrial economy.

V.Padmanand

D.P.Jadeja



DR. CHRISTY FERNANDEZ IAS



SECRETARY
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Response

The relative competitiveness of Indian SMEs in many sub-sectors is evident in terms of specialized clusters of small firms operating in different product segments along the National Value Chain. However, there are growing threats challenging their competitiveness with rapidly falling tariff barriers in the WTO regime. In this scenario, the complete National Value Chain need be strengthened by means of appropriate diagnosis and interventions.

I am happy that this volume highlights professional means for carrying out the same; emphasis on evolving appropriate policy and schemes, promoting FDI, evolving appropriate credit institutions / instruments, appropriate management upgradation, development of scale economies amongst SMEs by means of evolution of consortia and SPVs amongst firms for common procurement, marketing and common facilities / infrastructure, and so on. These are but some options presented in the volume that also presents the methodology to conduct a diagnostic study along the National Value Chain. While illustrations are oriented towards the textile sector, many of the concepts and tools presented are generic.

I have personally had the opportunity to extensively work in this sector to frame policies as well as to implement them. Several years ago, Mr. Padmanand worked with me in evolving some of the first few consortia and SPVs in India – export networks, raw material banks, decentralized CFCs etc. The approaches followed therein have now been emulated in several regions, clusters and sectors in the sub-continent as well established methods for delivering competitiveness and poverty alleviation.

I congratulate the authors for their sincere initiatives in compiling this volume for SME development practitioners and policy makers. I wholeheartedly commend this volume to entrepreneurs, policy makers as well as implementers in India and abroad.

New Delhi
3 October, 2007


(Christy Fernandez)



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Message

My research and practical experience with the rapidly changing sources of industrial competitiveness tells me that it is not the question of the survival of the biggest or smallest, but the fastest. The fastest keep pace with the rapidly changing dimensions of processing, design and marketing of products and survive in an internationally competitive environment. A number of factors external to the firms also affect industrial competitiveness; the current falling dollar-induced crisis in selected industries is a case in point.

*Scholarly inputs play a pivotal role in providing policy-makers and stakeholders with evidence-based policy advocacy. The book *Strengthening Industry Value Chains: Competitiveness and Poverty Alleviation in "Textiles" Clusters in India* by V. Padmanand and D.P. Jadeja should do just that and encourage stakeholders and policy-makers to think globally and act locally in order to integrate the local value chain into the global value chain.*

In the textile industry, for example, the elimination of the Multi-Fiber Agreement (MFA) quotas has led to intensified competition in domestic and international markets. Pressures for efficiency gains are constant. While tariffs on textile products have been gradually reduced, thereby eroding the benefits of preferential schemes (particularly for least developed countries) a number of non-tariff barriers to trade remain. The challenge for textile clusters in India is to convert comparative advantages into competitiveness. Competitiveness stems from enhanced adaptive capabilities to use modern technology and devices and to commercialize new knowledge. "Cooption", i.e., cooperate to compete, is the new industrial theology, and a collective response to competitive pressure is key to enhance competitiveness. This theology must, of course, play its due role in sustaining poverty reduction through the effective empowerment of the poor in the development process.

The most successful exporter of textiles and clothing, China, has not succeeded because of preferential market access but thanks to the country's capacity to produce large volumes of products according to international standards at incredibly low prices. The high segmentation of today's global production networks enables countries to specialize in a narrow task or product line, rather than having to produce the entire finished product; a positive trend for countries attempting to find a niche in higher stages of the value chain.

The garment sector is a promising sector for foreign investors seeking preferential market access granted to least developed countries (LDCs) under the AGOA and EBA schemes. Research, transfer of technology, and investment can play a crucial role among countries within a mutually beneficial framework. Intra-South trade and investment flows constitute an important part of this story. The authors know this and much more as evidenced by the content of the book.

Practical industrial stakeholders and relevant research aspirants will benefit a lot by drinking deep at the fountain of knowledge contained in the book.


Jebamalai Vinanchiarachi

AUTHORS PROFILE



V. Padmanand

An **economist and management professional**, he has been awarded M.Phil's from the **University of Cambridge (U.K.)** and the University of Madras, India. He has secured several National and overseas **awards for academic merit** and has been admitted to the status of Fellow in several National and international bodies including the Cambridge Commonwealth Society and the **United Writers' Association of India**. He has also been trained in academic areas at the **Indian Institute of Management, Ahmedabad, India**.

Padmanand possesses several **publications including (6 published) books**. Industrial development related initiatives are **covered by the business press/media** frequently.

He has served as Director/subject expert/specialist in numerous projects under the auspices of the **United Nations Industrial Development Organisation (UNIDO, Vienna) – appointed as International Expert on Cluster Based Industrial Development / National Expert /Enterprise Development Specialist (in India and Middle-East/Africa)**, the **European Union**, the **World Bank (IBRD)**, German Technical Co-operation (GTZ), bodies of the Government of India, **State Govt.'s**, the Small Industries Development Bank of India (SIDBI), and the **Commonwealth Secretariat, U.K. (Special Advisory Services Division as Economic, Financial and Marketing Expert) in the Southern African Region**.

Padmanand has intensively worked in most States in India and been in charge of projects involving **industrial development** across hundreds of locations and industrial clusters in India. He has worked extensively in **Namibia, Sri Lanka, Comoros/Madagascar, Sudan, Bahrain, Kuwait, Cambodia, Myanmar etc.** Contributed to evolution of **policy initiatives/schemes/programmes** for development of **Indian, Saudi Arabian and Sri Lankan** industry.

He has handled several courses in academic Post-Graduate Management education programmes at the Entrepreneurship Development Institute of India (EDI), Bombay School of Business (BSB) and the Indian Institute of Planning and Management (IIPM)- Also secured **awards for outstanding academic contribution**.

Padmanand has been involved in developing hundreds of Financial Accountants, EXIM consultants, industry chamber officials etc. into business counselors and in training thousands of entrepreneurs. Also provided advanced education to hundreds of senior bankers/corporate planners on conception & evaluation of **industrial/infrastructural projects**.

He has been providing Technical Advice to Textile Committee interventions in Indian clusters for several years since having trained its Cluster Development Agents (CDAs).

He has also served as a **MEMBER (Working Group), Planning Commission, Govt. of India** and as *National Expert (Private Sector Development - UNIDO and DIPP -Ministry of Commerce & Industry, India)*.

**The World Wide Web (WWW) has captured some of his initiatives (SEARCH for `v.padmanand' / "prof.v.padmanand" /"professor padmanand" employing any search engine like GOOGLE).*



D.P. Jadeja

D.P. Jadeja leads the Textiles Committee's Cluster Development Programme. With more than 34 years of experience in serving the Textile industry, a large number of offices and a large pool of trained resources and personnel at its disposal the Committee is one of the forerunner organizations in the CDP space. Jadeja has been responsible for following the guiding light of R C M Reddy, transforming the role of the Textiles Committee from that of a facilitating and coordinating agency to that of a full-fledged implementing agency. With his dedicated team of Cluster Development

Agents, Jadeja has worked in 23 clusters across the country and is currently implementing cluster development in 3 handloom clusters. He has worked in tandem with grassroot-level, local and global associations and business service providers to launch various sustainable initiatives for capacity building of SMEs. He has experience in a gamut of cluster initiatives that range from supply chain management, design interventions, infrastructure management, branding to consortia formation.

D.P. Jadeja, B.E. in Mech. Engineering also handled the responsibilities of textile machinery, market research and total quality management and has 34 years of experience to his credit. He has specialized in production planning and control in light engineering. An authority in implementing of ISO 9000 Quality Management Systems, Jadeja has received training in Lead Assessor from BSIQA, UK and in Calibration requirement for ISO 9000 from BVIS, Calcutta. He is a Certified Quality Engineer by RWTuV, Germany.