

**Rapid Assessment Study of the Impact of the Financial and Economic  
Slowdown on the Handicrafts Industry in Sanganer, Rajasthan**

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**May-June 2009**



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# **Rapid Assessment Study of the Impact of the Financial and Economic Slowdown on the Handicrafts Industry in Sanganer, Rajasthan**

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## **Introduction**

Rajasthan is well known for its traditional and rural crafts, which are spread across the state. The main crafts of the state are hand-printed textiles, metalware, woodware, leatherware, stone-carving, Meenakari work, etc. Sanganer, which is an important centre for the crafts industry, is located at a distance of 16 kms. from Jaipur. It is famous for its hand-printed textiles, and handmade paper and paper products. It is home to a large number of small-scale and large-scale textile and block printing units. Today, there are over 150 block printing units and around 6000 home-based units in the town.<sup>1</sup> In addition, it also boasts of around 120 paper-producing units. An estimated 40,000 people are directly occupied in these trades, including home-based workers.<sup>2</sup>

A large section of India's handicraft sector is oriented towards export. This sector is among the worst hit by the recent global financial and economic slowdown.<sup>3</sup> Handicrafts export fell by 54.62 per cent to \$13.53 billion between April 2008 and February 2009 as compared to the same period during the previous financial year. According to the Export Promotion Council for Handicraft, "The decrease in exports of handicrafts is due to the slump in demand in major markets of the US and Europe."<sup>4</sup>

This rapid assessment of the impact of the financial and economic slowdown was carried out over May and June 2009, and is presented in four sections. The first section briefly presents the objectives and method of the study, and the overall present situation prevailing in the handicrafts sector. Sections 2 and 3 present the key findings for each of the two groups of products studied, that is, block printed textiles and hand-made paper. The last section sums up the emerging policy priorities and suggestions of stakeholders on the ways to address the problems facing the sector.

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<sup>1</sup> A study conducted by UNIDO in 1999 reported that there are 250 block printing units in Sanganer. See Russo, (1999), p. 7.

<sup>2</sup> See Tables 4 and 7 for rough estimates of direct employment in the block printing and handmade paper sectors, which is usually available in Sanganer, and as reported in the rapid assessment exercise.

<sup>3</sup> See UNCTAD (2009) for more details on the economic slowdown and its impact on India.

<sup>4</sup> See <http://www.epch.com/EXPORTData.htm> for export data on the handicrafts sector (last accessed on 24 July 2009).

## Section I

### I. Objectives:

Given the above backdrop, the present rapid assessment study attempts to explore the impact of the global economic slowdown on the handicrafts sector in Sanganer.<sup>5</sup> The focus of the study is to identify the key problems faced by the block printing and handmade paper sectors, and to identify policy priorities in keeping with these challenges.

The specific objectives of this study are:

1. To explore how the shrinking international market and consequently shrivelling exports have affected the industry, that is, both the employers and the workers including the most vulnerable groups like women, groups of migrated workers, piece-rate workers and home-based workers.
2. To identify how both the quality and quantity of work are being affected by the economic slowdown, including recruitment/hiring, changing patterns in the employment relationship—regular employment, contractual employment, self-employment, or other forms of atypical work, number of days of work, wages, terms and conditions of work, etc.
3. To assess the coping mechanisms employed by workers and employers affected by the economic slowdown.
4. To consolidate the findings and develop policy recommendations for implementation at both the state and Central levels, and to identify the scope of social partners to effectively mitigate the negative social impact of the slowdown on workers and enterprises.
5. To suggest a roadmap for intervention to be discussed at the sectoral, national and inter-ministerial consultations.

### II. Methodology

This report is based on a rapid assessment arrived at through semi-structured interviews with a range of stakeholders including exporters, traders, workers including both unit level and home-based workers, government officials, office-bearers of exporters' associations, academics and NGOs working in Sanganer and Jaipur. Attempts have been made, through triangulation, to verify the information provided by various interviewees.<sup>6</sup>

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<sup>5</sup> Sanganer has been identified as one of the major hand-printed textile clusters of India by a study done by National Productivity Council. See National Productivity Council (2007), p. 146.

<sup>6</sup> The list of persons who were met during the course of this study is attached with this report.

Along with findings from the rapid assessment exercise, the key issues raised in a consultation of various stakeholders [including representatives of major trade unions, senior government officials, representatives of the Rural Non-farm Development Agency, the District Industries Centre, Commission of Industries, Rajasthan Mission on Livelihoods, Chamber of Commerce, Institute of Crafts and Design, as well as exporters and academics], have been included in this report.<sup>7</sup>

The effort has been to identify the broad contours of the problems facing both workers and enterprises in Sanganer.

### **III. Handicrafts Exports: The Current Scenario**

India's textile products, including handlooms and handicrafts, are exported to over a hundred countries. However, the USA and the EU together account for about two-thirds of India's textile exports. The major export destinations are Canada, UAE, Japan, Saudi Arabia, Korea, Bangladesh, Turkey, etc.

India's textiles exports have observed several ups and downs in recent times. This can be substantiated by the fact that India's share in the exports of global textiles and clothing in 2007 declined to 4 per cent and 2.8 per cent, from 4.3 per cent and 3.3 per cent, respectively, in 2006. Although India's textile and clothing exports in 2007-08, which stood at US\$ 22.13 billion, were badly affected by the strong appreciation of the Indian rupee against the US dollar, it still managed to record a healthy growth of 15.59 per cent in US dollar terms (in rupee terms, the growth was about 2.76 per cent).<sup>8</sup>

In 2008-09, the economic conditions prevailing worldwide have not at all been conducive for textiles exports. The world is currently passing through a recessionary phase and the major markets like those of the US, EU and Japan are facing a severe financial crisis. In this environment, the handicrafts sector is one of the worst hit sectors, particularly as the products offered by this sector are considered to flourish only in good times. The US, which is the single largest importer of textiles and clothing items, observed a negative growth of 3.34 per cent and 0.55 per cent in its imports of textiles and clothing from the world and India, respectively, during the calendar year 2008. The overall US markets of textiles and clothing have also shown a decline of 14.19 per cent during the first two months of 2009, while India has also recorded a decline of 13.77 per cent during the same period.<sup>9</sup>

The exports of the handicrafts section within the overall textile sector have also been facing a similar decline in recent years (see Chart 1). According to the provisional data available, the exports of handicrafts have shown a decrease of Rs. 150.34 crore, from Rs. 1491.18 in 2008-09 to Rs. 1340.84 crore in 2009-10, signifying a decrease of 10.08 per cent in rupee terms. In dollar terms, the exports have registered a decrease of U.S. \$ 103.20 million, that is, the exports decreased by 27.81 per cent over a similar period (see Table 1).

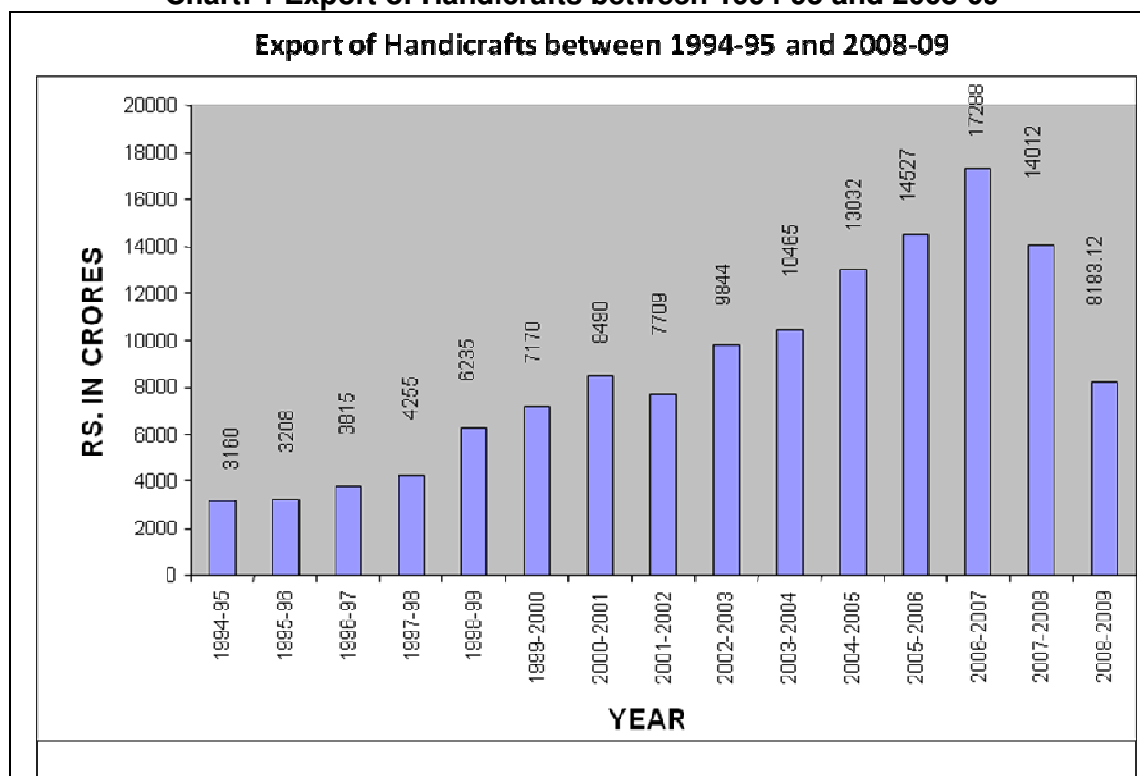
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<sup>7</sup> Stakeholders' consultation held in Jaipur on 17 June, 2009. The list of participants at the consultation is attached with this report.

<sup>8</sup> See [http://texmin.nic.in/note\\_on\\_indian\\_textile\\_and\\_clothing\\_exports\\_intl\\_trade\\_section.pdf](http://texmin.nic.in/note_on_indian_textile_and_clothing_exports_intl_trade_section.pdf) (portal of Textile Ministry, Government of India), last accessed on 25 July 2009.

<sup>9</sup> See the website of Securities and Exchange Board of India: <http://www.sebi.gov.in/dp/maraloverseas.pdf> (last accessed on 25 July, 2009).

**Chart: 1 Export of Handicrafts between 1994-95 and 2008-09**



Source: [www.epch.com](http://www.epch.com) (portal of Export Promotion Council for Handicrafts, India), retrieved on 25 June 2009.

The section pertaining to hand-printed textiles within the overall handicrafts sector faced a 13 per cent decline in rupee terms over the period 2008-09 to 2009-10. In US dollar terms, the decline is as high as 30 per cent (see Table 1). The Export Promotion Council for Handicrafts says, "The reason for [a] decrease in exports is due to slump in the recent global financial markets and slowdown of the economy".

**Table 1: Provisional Export Figure of Handicrafts during the Period, April-May 2009-10 as Compared to the Corresponding Period, of April-May 2008-09**

(US\$ at the rate of \*)

ITEMS	Rs. In cr.		Increase/ Decrease in % over 2008-09	US\$ in Millions		Increase/ Decrease in % over 2008-09
	2008-09	2009-10		2008-09	2009-10	
	(April-May)			(April- May)		
				*40.1893	*50.0619	
Hand-printed textiles & scarves	205.45	178.92	(-) 12.91	51.12	35.74	(-) 30.09
Total handicrafts	1491.18	1340.84	(-)10.08	371.04	267.84	(-) 27.81

Source: [www.epch.com/EXPORTData.htm](http://www.epch.com/EXPORTData.htm). Retrieved on 25 June 2009.

In 2008-09, various export promotion councils and trade bodies started making representations to the Government that exports of textiles have been adversely affected by the recent global economic slowdown, leading to a considerable loss of employment in the textiles sector. The exports of textiles and clothing during the period April-December' 2008 amounted to only US\$ 15.27 billion as against US\$ 15.25 billion in the corresponding period during the preceding financial year, recording a minuscule growth of 0.12 per cent.<sup>10</sup>

During 2007-08, handicrafts exports, a component of textile exports, amounted to US\$ 1.45 billion, recording a growth of 6.31 per cent over the exports figures achieved during 2006-07. During the period April-December 2008, the exports of handicrafts, including those of carpets, amounted to US\$ 0.858 billion, recording a sharp decline of 24.67 per cent over the exports achieved during the corresponding period of 2007.<sup>11</sup>

Within the handicrafts division, the exports of hand-printed textiles and scarves have also suffered a major setback in 2008-09 (see Table 2 for details).

**Table 2: Export of Handicrafts (Excluding Carpets) during April 2008-March 2009 as Compared to April 2007-March 2008**

Items	(Rs. In crores)				(US\$ million)		
	April 2007-March 2008	April 2008-March 2009	%age Increase/Decrease	% Share of Total	07-08 @ 40.2513	08-09 @ 45.5155	%age Increase/Decrease
Hand-printed textiles and scarves	1773.93	1116.86	(-) 37.10	13.65	440.71	245.38	(-) 44.32
Total handicrafts	14012.88	8183.12	(-) 41.60	100.00	3461.14	1797.88	(-) 48.35

Source: Handicrafts portal of the Government of India: <http://handicrafts.nic.in>, retrieved on 28 May 2009.

Some of the reasons attributed to this decline are the meltdown in the financial sector and economic slowdown in international markets, increased costs of production due to increasing costs of raw materials, power and other inputs, and competition from countries like China and Vietnam, which have affected both the profitability and exports of textiles, garments and handicraft units in India. The liquidity crunch is another factor affecting the industry.

The decline in the demand for exports is being seen in all the regions and countries, to which India generally exports hand-printed textiles. Table 3 shows that USA, hitherto the biggest destination for Indian hand-printed textiles, has reduced its imports of the same to almost half. A similar scenario can be seen in other countries too (see Table 3).

<sup>10</sup> See [http://texmin.nic.in/note\\_on\\_indian\\_textile\\_and\\_clothing\\_exports\\_intl\\_trade\\_section.pdf](http://texmin.nic.in/note_on_indian_textile_and_clothing_exports_intl_trade_section.pdf) (last accessed on 25 July 2009).

<sup>11</sup> See <http://handicrafts.nic.in> (last accessed on 25 July 2009), and <http://texmin.nic.in> (last accessed on 25 July 2009).



**Table 3: Country-wise Export of Hand-printed Textiles and Scarves (Rs. in crores)**

<b>COUNTRY</b>	<b>2007-2008</b>	<b>2008-2009</b>
Australia	32.77	16.42
Canada	102.05	57.18
France	100.22	58.52
Germany	146.35	84.21
Italy	66.58	36.19
Japan	60.19	31.94
The Netherlands	50.42	29.60
UAE	107.34	74.13
Switzerland	16.34	10.18
U.S.A.	535.86	304.71
U.K.	171.67	108.35
Latin American countries	27.63	14.08
Other countries	356.51	291.35
<b>TOTAL</b>	<b>1773.93</b>	<b>1116.86</b>

Source: website of the Export Promotion Council for Handicrafts of India: [www.epch.com](http://www.epch.com), retrieved on 25 June 2009.

Data on the share of Sanganer in the total export figures given in Table 3 is not available from these sources.

The Government introduced two packages of duty concessions, tax and interest rebates in December 2008 and January 2009, respectively, to provide a stimulus to the economy in general, to help it combat the recession.<sup>12</sup> The impacts of the above incentives were not reflected in the discussions with the entrepreneurs in Sanganer during the field visits. However, the entrepreneurs were looking forward to some more stimulus packages, as was revealed during the consultation held on 17 June 2009, at Jaipur.

## **Section II**

### **I. Block Printed Textiles**

The block printed textile sector falls under the handicrafts division of the Textile Ministry. The All-India Handicrafts Board has been constituted under the chairmanship of the Minister of Textiles with the Development Commissioner (Handicrafts) as the Member Secretary. The Board advises the Government on matters pertaining to the development of the handicrafts sector. The office of the Development Commissioner for Handicrafts functions under the Ministry of Textiles for the promotion and exports of handicrafts. It is headed by the Development Commissioner for Handicrafts and assists the state governments in planning and executing development schemes for handicrafts. It has six regional offices at Mumbai, Kolkata, Lucknow, Chennai, Guwahati, and New Delhi.

<sup>12</sup> Source: Note of Indian Textiles and Clothing Exports, Ministry of Textiles, Government of India.

These organizations, as shown in Chart II, are responsible for the overall policy framework and for communicating market information to the scattered artisans engaged in the manufacture of handicrafts of different kinds.

**Chart 2: Administrative Responsibility in the Hand-printed Textile Sector**



## II. Block Printed Textiles of Sanganer: History and Traditions

India has been renowned for its printed and dyed cotton cloth since the twelfth century and the creative processes involved in this printing flourished as the fabric received royal patronage. Different types of hand-printing techniques have traditionally been used in this country by people of varied customs and cultures. One of the most popular forms of hand-printing is Hand Block Printing, which has been in use since ancient times. Today, block printed products are in demand in the metropolitan cities of India as well as overseas, and block printed garments are being exported to different countries all over the world. Over the centuries, Sanganer town in Rajasthan has become one of the prominent centres for hand block printing, largely due to the patronage of the Jaipur royal family. It is said that King Sawai Jai Singh II (1688-1743), while building Jaipur city, invited a few printer families from Gujarat and Malwa (Madhya Pradesh) to settle in Sanganer. It is also argued that a printing tradition had pre-existed in Sanganer even before that. Using the illustrations of *bel* (creepers), *buta* and *buti* (floral motifs of varying sizes),

and *jaal* (floral net), the block printing traditions of Sanganer have acquired a distinct visual identity. The floral motifs show the strong influence of Mughal culture in India.<sup>13</sup>



A home-based block printing unit at Sanganer

Wooden blocks are used for printing in this technique. They are of different shapes and have designs carved at the bottom of the block. Teak wood is used for making the blocks, and skilled craftsmen prepare the designs. The size of a hand printing block varies from 2X2 inches to 6X6 inches. Rectangular and irregular blocks, known as *buntas*, are also used. Each block has a wooden handle and 2-3 holes, which are made to facilitate the free movement of air. Before being used, the blocks are kept in oil for 10-15 days, which imparts a certain softness to them. The life of a block is either six to eight months, or 600 meters of printing. The dyes used for printing are predominantly of vegetable or mineral origin. Now-a-days, however, chemical colours are also used.

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<sup>13</sup> See Bhandari, 2005.



Print job done by a woman in a large printing unit at Sanganer

The Chhipa community of Rajasthan has been practising the craft of block printing since centuries. Over time, members of the Chhipa community have developed a cluster of block printing units at Sanganer, which have become famous globally and the product thus produced is known as a Sanganeri print.<sup>14</sup> The Calico Printers Cooperative Society of Sanganer, which was established in 1944, had 80 families of block printers as its members. The cooperative became defunct for several years after its inception. Recently, however, the members of the Chhipa community have been trying to revive this cooperative, and are working to obtain a G.I. registration for Sanganer prints.

In earlier times, Sanganer block printing was linked to other block printing centres of India like Farrukhabad and Meerut in the north, and Bhavnagar and Rajkot in Gujarat. Sanganer had a traditional relationship with both Farrukhabad and Meerut, both of which were famous for the skill of making wooden and metal blocks, the most essential part of block printing. Bagru in Rajasthan is another centre for block printing. It is said that Sanganer used to cater to the needs of the royals and elites of Jaipur, whereas Bagru catered to the needs of the common man.

Today, various garments like *saris*, *kurtas*, shirts, *salwar kameezes*, *dupattas*, skirts, etc., are made from block printed fabrics in Sanganer. However, no specific data on Sanganer or exclusively on hand-printed textiles is available. Over time, Sanganer has imported many new techniques, styles, and designs as means of value addition for the final products. Earlier, embroideries, *kantha* stitches, etc. used to be done at different locations, but now one can find units or homes involved in these jobs in and around Sanganer. In recent times, the export of block printed garments has seen a steep increase with an increased demand from the Western countries, in view of the durability of the fabric and the distinctive patterns and designs seen in this art.

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<sup>14</sup> See Dhamija, 1992.



Sun bleaching is done after the printing

However, the technique of screen printing has been steadily displacing block printing. Today, hundreds of screen printing units have come up in Sanganer. In screen printing, the blocks are replaced by modern screens and vegetable dyes are replaced by chemical dyes. Screen printing also leads to much faster production. Except in the technique of making of the screen, the production process is not very mechanized in either case. In block printing, the wooden blocks are put on the colour palate and then pressed on the piece of cloth, whereas in screen printing, a wide brush soaked in a chemical dye is quickly brushed over a screen placed over a piece of cloth.

In Sanganer, both the block printing and screen printing techniques operate side by side. According to a rough estimate by an entrepreneur of block printing, 80 per cent of the total textile production is done at screen printing units. Several units also follow both the processes for different purposes. However, completely separate units for both the processes also exist at many places in Sanganer.

The environmental footprint of the craft has been a contentious issue. Screen printing, with its higher daily output, generates a higher quantity of chemical waste, leading to pollution, and contamination of river water and groundwater.<sup>15</sup> Moreover, the consumption of water is much higher in screen printing as compared to block printing.<sup>16</sup> Due to the pollution issue, the registration of new print units has been stopped for decades now. Owners of small block printing units have also been facing administrative hurdles even in obtaining electric connections.

A number of people associated with block printing have expressed their commitment to the technique of block printing using eco-friendly vegetable colours. Presently, the Calico Printers

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<sup>15</sup> See Kulshreshta, *et al.*, 2006.

<sup>16</sup> See Pal, 2003.

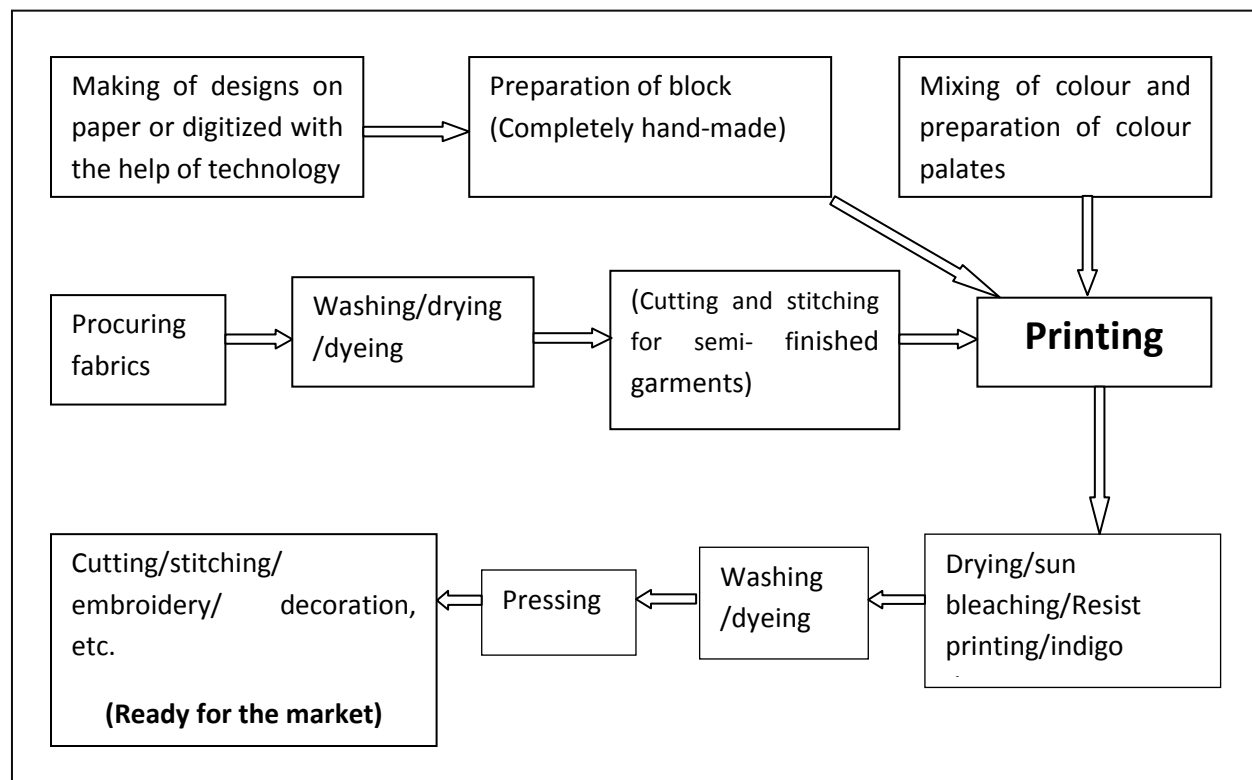
Cooperative Society is working with UNCTAD to obtain a GI (Geographical Indicator) registration for Sanganer block printing, which may help them establish a distinct niche for their product in national and international markets.<sup>17</sup>

Members of the Chhipa community have for long been associated with block printing in all its aspects. Today, they are the entrepreneurs, and owners of the smaller printing, and washing and dyeing units. A large section of the Chhipa community is also engaged in block printing at home through the use of family labour. Members of this community run both small and medium printing units, catering to both international and national markets. However, as with the other traditional occupations, there is a concern among the older members of the community that the younger generation is no longer interested in block printing.

### III. The Production Process and Value Addition in Block Printing

The production process in block printing can be divided into block making, preparation of the dye and the printing process, along with pre-printing and post-printing treatments accorded to the fabric. The entire process of block printing runs through several phases of value addition starting with the procurement of the primary material, that is, the fabrics. Chart 3 depicts the different phases of the production process as per the requirement.

**Chart 3: Flow Chart—Production Process and Value Addition in Block Printing**



<sup>17</sup> For more details on this initiative, see the portal of the Rajasthan Chamber of Commerce and Industry: <http://www.rajchamber.com/ruda.html> (last accessed on 25 July 2009).



Block printing undergoes seasonal fluctuations as climate plays a crucial role in block printing. Generally, the transfer of the colours used in printing on to the fabrics is better when the weather is hot. Hence, summer is the most suitable time for printing. Without the required heat, it is not possible to obtain the desired brightness and tint of the colour. The monsoon season is not suitable for block printing. Printing is also done in the winter, and the varying climatic conditions are used to imbue different hues and shades to the final product.

#### **IV. Labour Inputs in the Production of Block Printed Textiles**

The entire process is highly labour-intensive. A large number of workers who have migrated from UP, Bihar, and Madhya Pradesh, as well as from other districts of Rajasthan, are engaged in different activities in Sanganer. Workers are hired both on a daily wage basis and piece-rate basis. The female to male ratio is 30: 70 in the printing units. More women are involved in home-based jobs. The number of migrant women engaged in other work is higher than those involved in the actual printing.

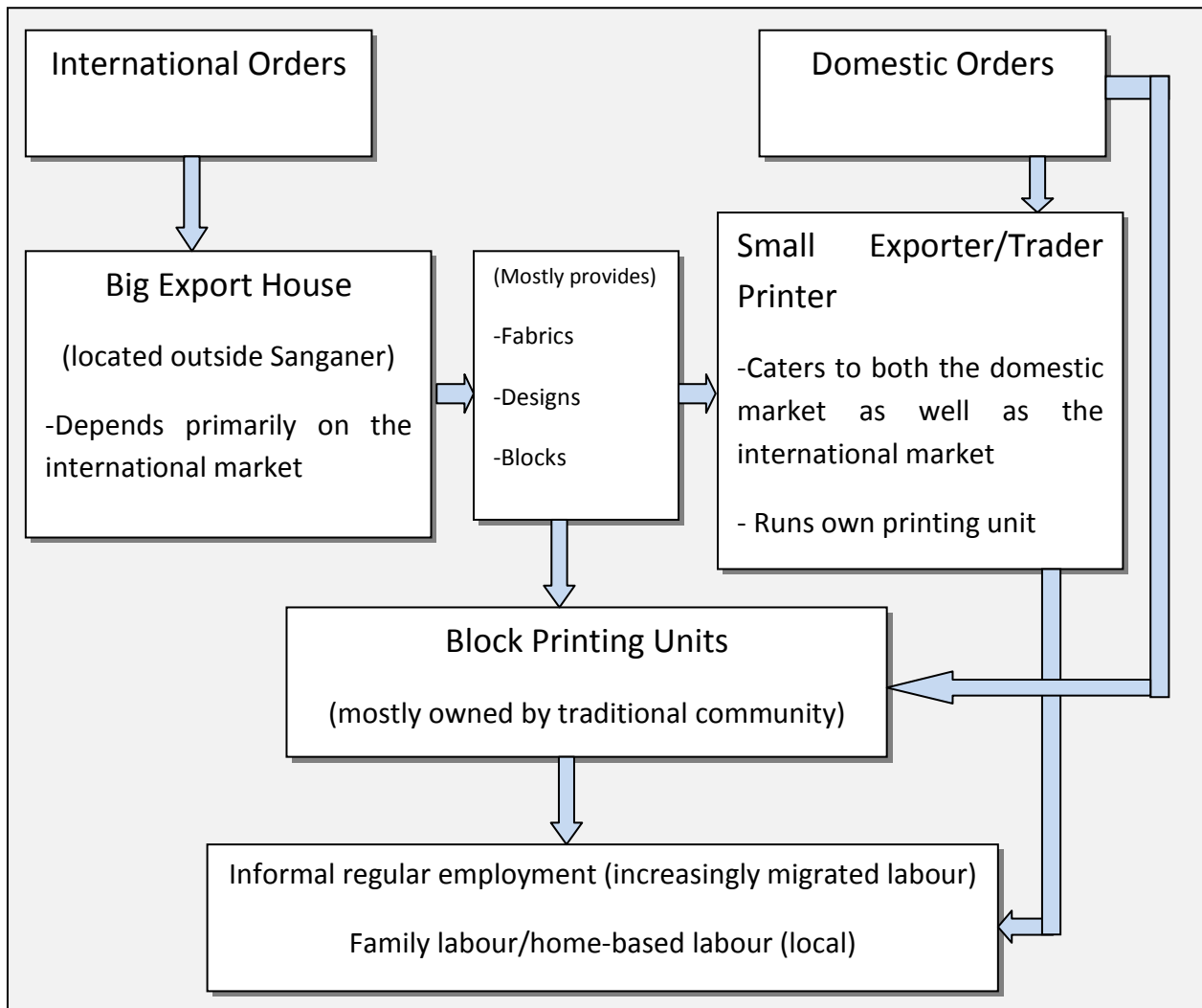
The skilled printers are mainly men. It is widely believed that the action of pressing the block on a piece of cloth requires greater strength in the wrist, which is why women are less able to print efficiently. However, a number of women, mostly belonging to the Chhipa community, are found in printing jobs. Women tend to be mostly found in what are believed to be 'lighter print jobs' and other work such as sorting of saps (one of the colouring agents for vegetable dyes), mixing of dyes and colours, hand embroidery, stitching of buttons and decorative objects like small pieces of mirrors or bids, cutting of extra threads, etc. The women engaged in these types of work are mostly migrants.



Women engaged in print job in a medium sized unit at Sanganer

The production of block printed textile is primarily done as per the orders placed by the bulk buyers from the domestic and international market. There are various people involved with the actual operation of production and marketing at various levels of operations. The operation of block printing sector of Sanganer is depicted in Chart 4.

**Chart 4: Flow Chart—Structure of the Market and Production in Block Printing**



During the rapid assessment, it was found that there is fierce competition among entrepreneurs engaged in both printing and marketing. The big export houses, or the large multipurpose exporters, who are mostly located outside Sanganer, generally pass the design or block, fabric and sometimes even the colour, to the printer-jobworkers (printing units) and trader-printers for the execution of orders.



The printing units print on the fabric supplied to them by the trader or exporter at a given rate per meter. The rate depends on the nature of the fabric and the number of colours used, and above all, on the rate quoted by competitors. The printing units often suffer from a capital crunch, which prevents them from procuring enough raw materials, especially the fabric. They generally have a stock of old blocks and three to five large tables for printing. They employ daily wage earners or printer-wage earners for both routine as well as specialized printing. On an average, a block printing unit may produce 30 to 50 meters of print job in a day, depending on the size of the unit.

The printing units compete severely, and at times compromise on the quality. This often results in rejection and a further squeezing of margins. A study undertaken in 2006 found that the negative competition over the years resulted in downgradation of printing units or printer-job workers into home-based workers or printer-wage earners.<sup>18</sup>

Home-based workers engaged in printing jobs have neither capital nor raw material but only their household premises and smaller tables to execute the print job. They are given cloth, block and dyes by the trader or printing unit owners. Their specialization lies in the aptitude for colour preparation and an understanding of printing methodology. Since the art of putting the block on a piece of cloth has been reduced to a routine job for normal printing, in many cases, the printing is done by daily wage earners not belonging to the Chippa community of Sanganer.

The daily wage earners in Sanganer are primarily those belonging to migrant communities, who have migrated from Bihar, Uttar Pradesh, Madhya Pradesh and other districts of Rajasthan.

On the basis of the available demand, the printing units decide the number of workers they need to hire so that the demand for workers fluctuates in response to market fluctuations. However, the highly skilled printers generally work with only one entrepreneur, and there tends to be relative permanence in the arrangement. Generally, the payment is made on a daily wage basis. The daily wage of a skilled artisan may vary between Rs. 150 and Rs. 350. These printers are often referred to as 'permanent' or 'regular' employees by the entrepreneur. There are always a few such 'permanent' or 'attached' workers with every entrepreneur, in the printing as well as dyeing and washing units. Often, workers borrow money from the employer at times of need (such as in the case of a daughter's marriage or for medical expenditure). A large sum may be advanced by the entrepreneur, and then deducted from the borrower's daily wage over a long period on an instalment basis. Such debt bondage is one of the reasons why a master craftsperson remains associated with one employer for a long period. The employer also needs the assurance of having a master craftsman who is always available and associated with him. Employers are also aware of the lucrative offers made to these master craftsmen by the new and emerging entrepreneurs. There is always a shortage of highly skilled craftsmen, who continuously experiment with designs and prepare the 'sample', which is the basis of new orders from big buyers in both the domestic and international markets. Given the increasing demand for new designs and greater variety in design, the master craftsmen play a crucial role in maintaining product competitiveness.

Other workers are generally hired on a piece-rate basis. On an average, a printer can earn up to Rs. 200, based on the level of his skill and the availability of the work. Workers in non-printing units (washing and dyeing units) earn up to Rs. 150 a day depending on the availability and quality of work.

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<sup>18</sup> See Sarkar, 2005.

All the contracts are executed on a verbal basis. The entrepreneurs claim to give equal rates to men and women,<sup>19</sup> but on an average, a woman worker earns less than her male counterpart, as she works for fewer hours due to her domestic responsibilities. Workers work 7 to 8 hours a day, depending on the availability of work. On occasions, this may go up to 10 to 12 hours.

**Table 4: Estimation of Workers Engaged in Block Printing in Sanganer**

Type of Unit	Average No. of Employees	No. of Units	Approx. Number of Employees in Regular Time (Before the Recent Recession)
Big printing units	25-30 (including associated washing and dyeing units)	25	750
Medium units	15-20 (including associated washing and dyeing units)	50	1000
Small units	6-10 (including associated washing and dyeing units)	100	1000
Home-based units	3-4 (including printing, stitching and other associated units)	6000	24000
<b>Total</b>			<b>26750</b>

Source: Rapid Assessment in Sanganer by ISST (2009).

Over the years, there has been a trend of independent artisans becoming job workers and piece-rate workers. A study reports that, the age-old production process got disturbed with mechanization and monetization of the village economy. It says, "In the changed scenario, the supply of raw materials became conditional to monetary resources, artisans got more distanced from final consumers, and the social safety net got eroded. In the ensuing shake out, only a few printers emerged as successful traders or trade-cum-printers. Many were reduced to printer-job workers or marginalized to wage earners."<sup>20</sup>

## V. Impact of the Recession on Block Printing Style

Every entrepreneur and exporter associated with block printing in Sanganer, who was contacted for the study, reported that there has been a continuous decline in demand over the last two to three years. The crisis has worsened (style) during the last one year, when the respondents

<sup>19</sup> The study by National Productivity Council (2007) found almost same wage rates for both male and female workers in hand-printed textile sector. P. 151.

<sup>20</sup> See Institute of Development Studies (2006), p. 64.

claim to have seen a 30-40 per cent drop in orders.<sup>21</sup> However, the large domestic market for block printed textiles has cushioned the trade against the adverse impact of the recession. Some exporters have partially shifted to the domestic market, even though the margin of profit there is lower and the presence of a greater number of players in the domestic market leads to intense competition in addition to the competition from units engaged in screen printing, which is cheaper and faster than block printing. A few entrepreneurs claim that demand has fallen even in several quarters of the domestic market. A trader reported that none of his bulk buyers, that is, the state handicrafts emporiums, has placed any fresh order since December 2008. With more entrepreneurs joining the domestic market due to the recession, competition has thus increased sharply. A few of the entrepreneurs have even lost their businesses due to the rising competition.

While export orders have not completely stopped for everyone, the volume of the orders has gone down. The limited orders being placed currently are for a variety of designs but in reduced volumes. On an average, the demand for a particular design has been reduced by 70 per cent, as reported by an exporter at Sanganer. Another exporter reported that while in May and June 2008, he had ten international orders from Europe, this year he had not received a single international order so far. In contrast, a medium level Chhipa entrepreneur revealed that he was busy preparing his first direct international order. This is definitely not representative. However, it shows the informal ways and the personal networks established by the exporters through which international orders may be procured. Several entrepreneurs also pointed out that Sanganer is often visited by the representatives of international buyers, who collect the samples developed by the local artisans and also place orders at times.

## **VI. Impact of the Recession on Workers and Employment**

According to a rough estimate by the entrepreneurs, 70 per cent of the hand printed products are made in units and 30 per cent through home-based workers. In the case of hand-made paper, limited modernization and opening up of the international market gradually led to the emergence of a few really big export houses, while there are plenty of small paper-making and paper product units. Later, within a couple of decades, most of the small paper units closed down. The recent market contraction has led to a fall in employment, which has not had a significant impact on highly skilled artisans, but which has severely hit semi-skilled workers, a group that is dominated by women and migrants. “Wages have not reduced much but the number of days of work have fallen drastically”, reports a worker in a printing unit. Roughly 60 per cent of the workers engaged in this sector in Sanganer are migrants. The lack of work/loss in earnings has led to reverse migration, as reported by several entrepreneurs. Some retrenched workers have been absorbed in screen printing units. Several others, unskilled and semi-skilled, have moved to other sectors in search of work.<sup>22</sup>

Table 5, which has been prepared on the basis of interviews with the entrepreneurs and workers, shows the loss in terms of wages and the number of days of work in Sanganer.

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<sup>21</sup> A recent survey carried out in Sanganer by the PHD Chamber of Commerce, Rajasthan, arrived at a similar figure of a 30-40 per cent reduction in orders. This was reported by an official of the organization during the stakeholder consultation at Jaipur on 17 June, 2009, organized by ILO and ISST.

<sup>22</sup> Estimating the numbers and size in each group will require a more careful micro study and could not be reliably ascertained in this rapid assessment.

**Table 5: Changes in Wages and Job Availability for Various Categories of Workers in the Block Printing Sector of Sanganer**

Category of Worker	Usual Earnings		Earnings in Recent Months	
	Avg. income per day (if work is 8-10 hrs. a day)	Avg. days of work available in a calendar year	Avg. income per day (if work is 8-10 hrs a day)	Avg. days of work available in a calendar year
Highly skilled artisans (all men)	Rs. 200 to Rs. 350	280-300 days	Rs. 200 to Rs. 350	250-280 days
Moderately skilled printers (mostly men, but also a few women)	Rs. 150 to Rs. 200	200-250 days	Rs. 150 to Rs. 200	150-200 days
Semi-skilled workers in printing and non-printing units (mostly women)	Rs. 100 to Rs. 150	180-200 days	Rs. 100 to Rs. 120	100-150 days
Unskilled workers (both men and women)	Rs. 80 to Rs. 100	150-200 days	Rs. 80 to Rs. 100	100-150 days
Families of home-based workers	Earn up to Rs. 5000 in a month, if jobs are available		Earn up to Rs. 3000-Rs. 3500 in a month if job is available	

Source: ISST study at Sanganer, 2009.

Taking the upper end for both income and the number of days of work from Table 5, it can be seen that the drop in annual incomes as a percentage of the base level varies by the category of worker as shown in Table 6.

**Table 6: Drop in Annual Incomes by the Category of Workers in Block Printing**

	Annual Income (Base Level)	Annual Income (after Recession)	Percentage Fall
Highly skilled artisans (all men)	105,000	98000	6.7
Moderately skilled printers (mostly men but also a few women)	50,000	40,000	20
Semi-skilled workers in printing and non-printing units (mostly women)	30,000	18,000	40
Unskilled workers (both men and women)	20,000	18,000	25
Families of home-based workers	60,000	42,000	30

Source: ISST study at Sanganer, 2009, based on interviews and discussions.

A number of entrepreneurs reported that reverse migration has also created a shortage in the labour market. This shortage of labour is felt when large orders are received and have to be executed.

## VII. Social Security Measures for Workers in the Block Printing Sector

Despite the fact that thousands of workers are employed in these crafts, no labour union or labour welfare organization is active here. During the Stakeholder Consultation held at Jaipur, it emerged that trade union leaders have perceived the Sanganer cluster as consisting of home-based units not suited to trade union intervention. Since trade union activity in the unorganized sector as a whole is weak, this cluster has so far not received much attention from labour leaders. (Presently, UNIDO is trying to revive the Calico Printers Cooperative.)

Recently, a few NGOs have come up in Sanganer, at the initiative of the community leaders of the Chhipa community and the entrepreneurs in order to intervene in the social, education and health issues of the workers engaged in block printing. They have been able to motivate a few workers but are yet to include a large number of people involved in the process of block printing pertaining to style.

The level of awareness about the existing schemes of social security is low among both workers and entrepreneurs. Very few people have been found to be registered under the Janashree Bima Yojana of LIC<sup>23</sup> and the Rajiv Gandhi Handicraft Health Insurance Scheme<sup>24</sup>. Even if they register, many a time, they do not continue the policy and default on payment of premiums in the following years.

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<sup>23</sup> More information available on [www.licindia.com/social\\_securities\\_001\\_features.htm](http://www.licindia.com/social_securities_001_features.htm)

<sup>24</sup> More information available on <http://handicrafts.nic.in/welfare/rajivgandhi.htm>

## SECTION III

### I. Hand-made Paper Sector in Sanganer: History and Traditions

Members of Kagzi, a community that traditionally specialized in the making of paper, are said to have accompanied the Mughal emperor Babur to India in the sixteenth century and eventually settled in Sanganer on the invitation of the then ruler of Jaipur, Maharaja Jai Singh. The local hand-made paper is made from recycled cloth and waste paper, and usually incorporates natural materials such as grass, flowers and petals as decorative elements. It is acid-free, does not contribute to the escalating deforestation and does not consume as much energy and water as machine-made paper does, thus making it an eco-friendly option. It is also more durable than machine-made paper and does not tear easily or facilitate erasure and forgery.<sup>25</sup>



Decorative hand-made paper sheets in a hand-made paper unit at Sanganer

Over the centuries, Sanganer has become an important centre for the production of hand-made paper. Traditionally, the paper was in use in the royal court for official documentation and writing of the Holy Quran. Later, it became an important material for court documents, university degrees and stamp papers in modern India because of its durability. However, hand-made paper products have a limited domestic market. In the early 1990s, the paper units in Sanganer experienced a boom due to a large demand from overseas for stationery and gift items. Over a hundred paper units were set up, but not all could survive, and today there are only four to five big paper-making firms in Sanganer besides twenty odd small units. The big firms are mostly oriented to export to USA and Europe while the smaller units cater to the domestic market.

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<sup>25</sup> Institute of Development Studies, 1983.

Hand-made paper and board industries in India almost exclusively manufacture for global markets. In 2007, the export of hand-made paper and paper products was estimated to be around Rs. 40 crores. A number of hand-made paper and paper product manufacturing units have become '100 per cent export oriented units' and have helped in increasing the foreign exchange of the country. Products made from hand-made paper include decorative papers, carry bags, gift boxes, diaries, photo frames, lamp shades, etc. Overall, there are around 3800 hand-made paper units, which include conversion units, papier mache and manufacturing units, accounting for a production of Rs. 128 crores and providing employment to 28,000 rural artisans in India.



Hand-made paper products

Hand-made paper, which constitutes one of the major rural industries of the country, falls under the purview of the Ministry of Micro, Small and Medium Enterprises of the Government of India, and more specifically, the Khadi and Village Industries Commission (KVIC).<sup>26</sup>

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<sup>26</sup> See the portal of Khadi and Village Industries Commission: [www.kvic.org.in](http://www.kvic.org.in)

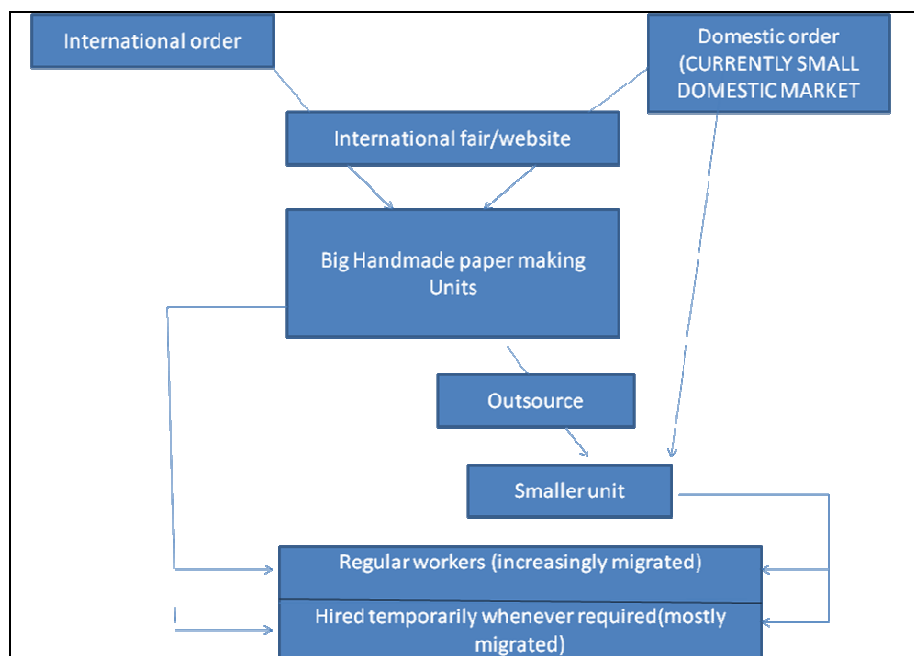
**Chart 5: Hand-made Paper Industry—Administrative Responsibility**



**II. Hand-made Paper Industry in Sanganer: The Current Scenario**

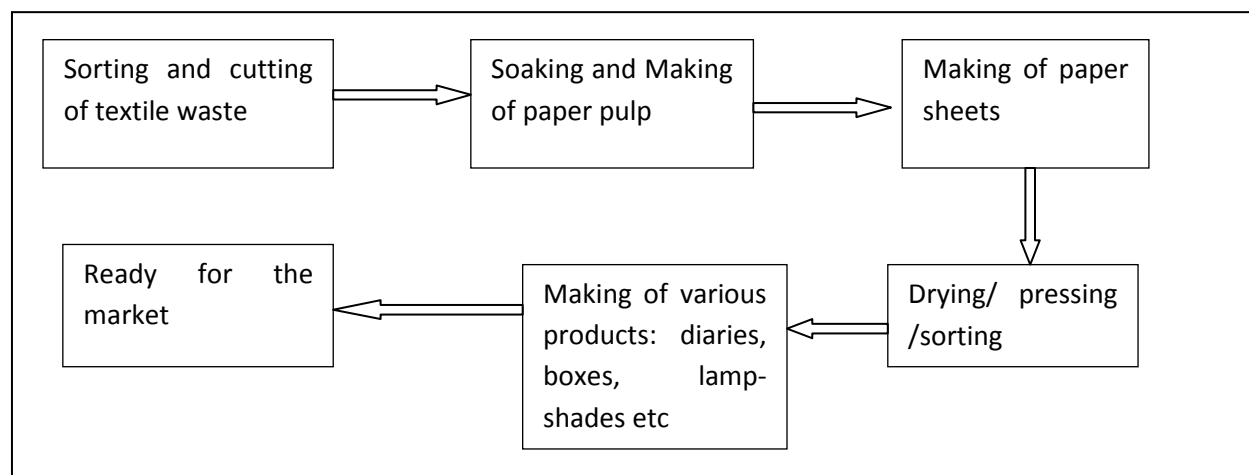
Today, the hand-made paper industry in Sanganer largely depends on the international market, due to the absence of any sizable domestic market for the products. The market and structure of the production process in this industry are depicted in Chart 6.

**Chart 6: Hand-made Paper Industry—Market and Structure of the Production Process**





**Chart 7: Production Process and Value Addition in the Hand-made Paper Industry**



The production of paper products is highly labour-intensive. Today, as in the case of block printing, the hand-made paper sector too is dominated by migrant workers from Bihar and Uttar Pradesh. However, the entire process from the making of a paper sheet to the production of the final paper-made item is done at the unit level. In the big paper manufacturing units, workers are hired on an informal but regular basis and at times on piece-rates. Table 7 shows the approximate number of workers in the sector.

**Table 7: Estimation of Number of Hand-made Paper Workers in Sanganer**

Type of Unit	Avg. No. of Workers	No. of Units	Approx. No. of Employees in Regular Time
Big units	100-150	10	1500
Medium units	50-60	50	3000
Small units	20-25	70	1750
Home-based workers (who only make paper products)	4-5	500	2500
Total			8750

Source: Rapid Assessment Study at Sanganer (2009), by ISST.

### III. Impact of Recession on the Hand-made Paper Sector in Sanganer

The hand-made paper industry has been hit badly by the current economic slowdown. According to one respondent, the current financial year has seen 40 to 50 per cent less new orders than the previous year, while another respondent claims that the figure is actually 60-70 per cent less orders. While the export demand has always displayed seasonality, with the demand dropping after Christmas, this year, the slump in demand has been more pronounced.

As in the case of block printing, orders for hand-made paper continue to be placed but there has been a reduction in the size of the orders. The domestic market for hand-made paper is not wide enough and exhibits limited demand, which is not sufficient to offset the decline in international demand.

While the production of hand-made paper has not stopped completely, the volume of production has fallen significantly. The group of workers most affected by the crisis is that of the migrant workers, who are hired on a temporary basis to fulfil orders from the international market. Contractual labourers are not being hired at present. Over the last year, the effect of the financial crisis has been felt the most by contractual, semi-skilled labourers, who are mainly women. Thus, the economic downturn has also had a gender impact.

The paper industry has also been affected by the crisis in another way. The prices of raw materials for paper-making have gone up. The main raw material for this industry is hosiery waste, which comes from South India and Kolkata. Having been hit by the financial crisis, the industry has thus reduced its production. Consequently, the availability of waste has gone down and its price has gone up. Some smaller paper units in Sanganer have responded by shifting from the production of decorative papers to that of packaging materials. So far, however, no decrease has been seen in the number of people coming for training (in hand-made paper production), as reported by the Kumarappa National Training Institute for hand-made paper, located in Sanganer.

## Section IV

### I. Tackling the Crisis

The pre-crisis scenario indicated the unsustainability of the Sanganer cluster, which has been further aggravated by the current slowdown.

The intention behind this rapid assessment is to identify ways in which the current crisis can be tackled so as to be able to meet the decent work commitments of the ILO and the Government of India. In the course of the study and during the stakeholder consultations, a number of suggestions were made on ways in which the four strategic objectives of the Decent Work agenda—fundamental principles and rights at work and international labour standards; employment and income opportunities; social protection and social security; and social dialogue and tripartism—can be taken forward for the workers in the block printing and hand-made paper segments. The roles of the Government, private sector, employers, trade unions, and community, were all discussed at length during the Stakeholder Consultation held at Jaipur.

These discussions and the inferences drawn there from are summarized below.

#### ***(i) General: On the Industry in Sanganer:***

1. The decision that needs to be taken for Sanganer, while recognizing the value of preserving traditional skills and designs, and doing so in an ecologically sensitive manner, is the imposition of a ban on the use of chemical dyes, and on screen printing, while allowing and encouraging the production and sale of traditional handicrafts made by using natural vegetable dyes and hand block printing. Commercialization in the sector has been promoted by globalization, and the financial crisis provides an opportunity to check the resulting adverse outcomes of this commercialization.
2. The sustainability of this kind of development trajectory will require the emergence of a consensus among all stakeholders and a co-operative effort to introduce improved technology and new designs in the trade. This would permit the revival of the sector in such a way that while it builds on tradition, it is, at the same time, oriented to the market and able to make the best use of knowledge and skills that may not have been previously available.
3. A stimulus package needs to be developed on the basis of a careful study of the sector. The proposed package should not only respond to area-specific priorities but also promote investment in infrastructure, which will help increase purchasing power. The components of the stimulus package may be broadly defined as product development, entrepreneurship development, provision of credit and market linkages, and overall the adoption of a cluster approach. [A proposal has already been made for a hand-made paper cluster, and elsewhere in Rajasthan (such as in Bagru), this approach is being implemented in other handicraft clusters]. It was also pointed out that any genuine attempt to revive the sector needs to go beyond the mere provision of inputs to industry, towards making a strong effort to promote education and skill training among the community.

***(ii) Employment and Income Opportunities: Strengthening the Market***

4. As far as markets are concerned, these products do have an established market, but a stronger domestic orientation in terms of markets may be useful. The ways in which the government might be able to support this process could be explored, such as placing orders for letterhead paper/visiting cards for government officers. The participation of producers in the hand-made paper sector in national trade fairs and facilitation to allow the exhibition and sale of their products in outlets within and outside Rajasthan has also been mooted to strengthen the markets for this sector.
5. Insofar as exports are concerned, the proposed supportive measures include provision of subsidies for transport, and the introduction of market strategies such as long-term rate contracts; above all if 'Geographic Indication (GI)' can be established for the products (a process that is currently under way with support from UNCTAD), this would help in their branding and marketing overseas.
6. The problems of procuring raw material for hand-made paper and the rise in prices, while highlighting the impact of the recession elsewhere, also offer an opportunity to explore new and labour-intensive ways of obtaining suitable raw material locally. For example, women used to earlier make paper out of locally available scraps of cloth; this later gave way to mechanized processes; and later still, the import of material from other parts of the country was found to be a better alternative. The recession may provide an opportunity to review these changes.

***(iii) Worker Rights and Tripartite Dialogue***

7. Trade unions have so far not tried to organize workers in Sanganer, and it is therefore necessary to identify appropriate ways for developing a joint voice and enabling all participants in the industry to present their points of view.
8. There is a need to recognize the increased presence of migrant workers, to ensure their registration, and to deal with their usual problems of housing, health and education.
9. A strong need is also felt for developing a forum in Sanganer, for representing craft workers, community members, owners of enterprises, the design institute, and government officials, all of whom should adopt a shared approach in order to ensure compliance with the agreed norms.

***(iv) Social Protection and Skill Upgradation***

10. The Rajasthan government must be accorded recognition for being a pioneer in starting the Rajasthan Mission for Livelihoods in keeping with the national commitment to achieve skill upgradation; this mechanism must be exploited further in order to address the situation. Similarly, the Institute of Design, which already has considerable relevant experience in the sectors concerned, can be actively involved in identifying new and

improved technology and designs, and in enhancing the skills available to the traditional community engaged in the work.

11. Careful study is also needed to understand the reasons for the low level of awareness and the low access of the craftspersons to the various schemes which they are entitled to.

***(v) Need for Further Research***

12. The rapid assessment study could identify the broad contours of the problems facing the workers and enterprises in Sanganer. However, any plan of action for the area will need to be based on more comprehensive study for capturing the nuances of the sector and disaggregating it as the impact of the crisis may be different on different groups. For example, it is likely that the impact on the block printing of garments varies has varied from that on yardage. Such detailed micro research can capture specificities, which, in turn, can be woven into planning and policy implementation.

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6. Rajasthan Chamber of Commerce and Industry: <http://www.rajchamber.com/ruda.html>
7. Social Security Schemes of Life Insurance Corporation of India: [www.licindia.com/social\\_security\\_001\\_features.htm](http://www.licindia.com/social_security_001_features.htm)
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12. Kamaljeet, Home-based Worker (Block Printing)
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20. Santosh Kumar Dhanopia, Entrepreneur and Secretary of Pragati Shilp Sansthan, A Handloom and Handicraft Group Working for Upliftment of Art and Artisans
21. Sunit Jain, Exporter, Block Printing and Hand-made Paper Products
22. Surjit Singh, Director, Institute for Development Studies, Jaipur
23. Vijaylakshmi, Home-based Worker, Block printing.



**Stakeholders' Meeting on the Effects of the Global Financial Slowdown in the Handicrafts Industry in Sanganer, Rajasthan**

**Date: 17 June 2009**

**Venue: Conference Room, Om Niwas, E-23 Kaushalya Path, Bani Park, Jaipur**

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**List of select Institutions/ Organisations at Jaipur and Sanganer working on Handicrafts**

1. **Indian Institute of Craft and Design (IICD), Jaipur**—This is a unique institution that is synergizing traditional knowledge and skills with contemporary needs to evolve methodologies that are relevant to modern India. Conceived as a nodal centre for excellence in craft and design, it runs programmes in education, training and outreach, research and documentation, and advisory and consultancy services. The training and outreach programmes are conducted at the grassroot level with artisans, self-help groups (SHGs) and non-governmental organizations (NGOs). These are multi-disciplinary in approach and are designed to add value to agencies working in craft development and promotion as well as to provide a platform for students to directly interact with the craft communities. (More information available on <http://www.iicd.ac.in/>).
2. **Kumarappa National Hand-made Paper Institute, Sanganer**—This Institute is an autonomous body functioning under the Khadi and Village Industries Commission (KVIC), Ministry of Micro, Small and Medium Enterprises, Government of India, and is engaged in applied research and development, consultancy and technical services, human resource and development for the growth of the Indian hand-made paper industry. The research and development activities of the Institute mainly lay emphasis on exploring various alternative raw materials that are abundantly available in various regions of the country. (More information available on <http://www.knhpi.org.in>).
3. **Calico Printers Co-operative Society, Sanganer**—This is an artisans' association, which is spearheading the block printers' movement against their relocation from Sanganer.
4. **Shilpi Sansthan ( An NGO)**—This is a group of proficient hand block textile printing industries, established in 1991 by the National Award Winner, Mr. Brij B. Udiawal, to promote training in the craft, to prevent the hand block textile printing technique from becoming extinct and to encourage the use of vegetable dyes. (More information available on [http://shilpihandicraft.com/the\\_ngo.htm](http://shilpihandicraft.com/the_ngo.htm)).
5. **Pragati Shilpi Sansthan**—This is an NGO run by artisans to look after the well-being of the workers.

**List of Questions Used in the Rapid Assessment Interviews**

**Questions for the Workers**

***Contract related:***

Type of contract—a) permanent or b) contractual,

Mode of payment—a) monthly salary, b) piece rate basis, d) hourly/daily wage

Nature of contract—a) written or b) verbal

How long do you work per day?

How much do you earn per month?

***Social Security/Membership related:***

Do you have any kind of insurance? If yes, describe the details of the policy.

How do you pay for your medical expenditure? Is it paid by your employer? If yes, under what terms and conditions?

Do you have any secondary source of income?

Do you have a bank account?

Do you save? If yes, how do you save?

Do you avail of any pension scheme offered by your employer?

Are you entitled to Provident Fund (PF)?

Are you a member of any SHG?

Are you a member of any Union?

***Migration related:***

What is your place of origin? State your migration history.

How did you choose the destination (Sanganer in this case) and the sector?

Where do you live now? (Rented accommodation or own house)

Do you live with your family here? If not, do you live in a group with other workers?

What are the problems that you face on a day-to-day to basis in the place where you live?

What does your spouse do? How many children do you have? What do they do?

How often do you visit your native place?

Do you own any land, house or any other property in your native place?

**Questions for Home-based Workers:**

Do you or any of your family members work at home as a home-based worker?

If yes, whom do they work for?

What is the mode of payment?

How much do you earn per month?

**Questions for the Exporters/Entrepreneurs**

***Labour related:***

Do you have your own unit?

How do you appoint labourers?

Do you acquire labourers through the labour contractor?

Do you have contractual labourers or permanent labourers? If both, what is the ratio?  
How do you finalize the contract (written or verbal)?  
Do you have women workers? What is their ratio to men?  
What kind of work do women workers do?  
Is there any difference between the wage paid to the men and women workers? If yes, why so?  
What is the mode of payment you practise?  
What facilities do you provide to your workers in terms of social security schemes, pension, provident fund, medical insurance, etc?  
Is there any workers' association or labour union active in your unit?

***Export related:***

Have you felt any impact on export/production in recent times? If yes, what kind of impact?  
Is there a decline in demand?  
What percentage have the exports reduced by?  
How are you coping with the situation?  
How does the current situation affect the employment pattern?  
What is your expectation from the government?  
Are there any other important issues that trouble you, irrespective of the current situation?