

FINAL REPORT

EVALUATION OF CENTRAL SECTOR SCHEME DURING XI PLAN

Quality Certification System



SPONSORED BY

**CENTRAL SILK BOARD
MINISTRY OF TEXTILES
GOVERNMENT OF INDIA**



SUBMITTED BY

**ECONOMIC SERVICES GROUP
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CHAPTER I

ABOUT THE STUDY

1.1 Background

The Indian Silk over the years has been positioned in international market in isolation with fragmented promotional effort. The lack of depth and synergy is too evident as many of the exporters tend to be highly individualistic in their attempt. The Indian Silk has tremendous strength in terms of its exclusiveness, cluster based production, varieties in terms of its weave, pattern and cover, the vibrant colours, intricate designs, rich drape and fall. All the properties of Indian silk are difficult to capture and promote in an international market.

Quality Certification System (QCS) scheme has been implemented as a Central Sector Scheme for promoting the purity of Silk products in India. The scheme was launched by Central Silk Board (CSB) and is aimed at ensuring and maintaining quality at different levels of silk production process (silkworm seed, cocoon and raw silk production). The scheme aims at instituting quality pricing system for cocoons and raw silk in the country, by establishing Cocoon Testing Units, Raw Silk Testing Centres and promoting “Silk Mark”. The very purpose of the scheme has been to ensure production of quality silk in India of international standards to compete in Global Markets. Due to the intensive activities carried out to promote “Silk Mark”, the Indian silk consumers are beginning to come under the “search good” factor, which in the coming days would catalyze to increase the demand for pure silk products.

In order to protect the diversity and richness of the Indian silk industry and deliver new forms of value to the international consumers, “Silk Mark” scheme was launched. The purpose is to establish Indian silk brand so that international buyers may source the genuine ‘Indian Silk’ from the Indian market. The objective of “Silk Mark” Scheme is to create awareness among the consumers about the purity and quality of silk products and instill confidence in them on the quality of silk products. Silk Mark protects the interests of consumers who are being cheated by traders by selling spurious products in the name of silk. The Cocoon Testing Center and Raw Silk Testing Center components of the scheme has been expected to put in place a quality based pricing system to ensure quality at different

levels of production processes such as production of quality cocoons and raw silk, which ultimately results in production of quality silk products. Besides, the scheme will bring in quality awareness among the silk producers to get better returns for their silk products and also ensure quality assurance systems to the buyers / consumers and increases the demand for Indian Silk both in domestic and International markets.

In order to assess the impact of the Central Sector Scheme “Quality Certification System” implemented by CSB during XI Five Year Plan, Planning Commission of India suggested Central Silk Board to carry out an independent third party evaluation. CSB approached National Productivity Council (NPC), an experienced agency in the field of evaluation and monitoring of various Government Schemes to undertake the evaluation through a Memorandum of Understanding. The study has addressed the relevance and impact of the Scheme and has come out with implementable recommendations for modifications for better implementation of the Scheme during XII Five Year Plan.

The present study report by NPC focuses on the evaluation of the Quality Certification System Scheme and its findings are based on the field level data/information gathered from various stakeholders through structured questionnaires. Field Surveys have been undertaken across all the nine SMOI chapters based at different locations in India.

The study had been carried out with the following objectives and terms of references:

1.2 Objectives of the Evaluation Study

To study whether the Quality Certification System (QCS) Scheme has really created awareness among the public about the purity of silk and its usefulness as well as to ascertain the effectiveness of the scheme in modifying the purchase behavior of consumers.

1.3 Terms of Reference

- i. Relevance of the Quality Certification System Scheme
- ii. To find out, whether the Silk Mark Organization of India (SMOI) is protecting the interests of the silk consumers.
- iii. Effectiveness of the Cocoon testing & Silk Testing units established

- iv. Usefulness of Silk Mark Label and its effectiveness among the users and stakeholders in domestic & international markets.
- v. Evaluation based on visits to quality certification system established.
- vi. Sample survey of silk traders in all the SMOI centres viz., Bangalore, Mumbai, Chennai, Varanasi, Hyderabad, New Delhi, Guwahati, Srinagar, Kolkata, Lucknow, Coimbatore, Palakkad and Panchkula.

1.4 Methodology

The methodology adopted for carrying out the evaluation study of the QCS has been delineated as follows:

- The study had been carried out in two phases. First phase of the study focused on detailed analysis based on published and unpublished literature and data on Quality Certification Systems of CSB during the XI Five Year.
- Second phase of the study focused on detailed field level interviews and discussions to study the Central Sector Scheme “Quality Certification Systems” during XI Five Year Plan implemented through Silk Mark Organization of India.
- Field survey involved discussions and meetings with the officials of SMOI and officials from silk traders centre regarding the quality parameters such as silk mark label on raw silk and cocoon sale.
- It was observed that major concentration and effort during XI plan period under QCS has been led on Silk Mark. Hence, major focus of the study has been on the evaluation of Silk Mark Organization of India (SMOI).
- The field surveys have been conducted through structured questionnaires across various chapters of SMOI based at Bangalore, Mumbai, Chennai, Varanasi, Hyderabad, New Delhi, Srinagar, Kolkata, Guwahati, Lucknow, Coimbatore, Palakkad, and Panchkula (**Annexure 1-QCS 01**).

- The field surveys also included detailed structured interviews with authorized users (**Annexure 2- QCS 02**), retailers/customers (**Annexure 3- QCS 03**) of silk goods and Cocoon or silk testing centres (**Annexure 4- QCS 04**) at all the SMOI centres in order to gauge the awareness and demand for silk mark labeled products among various user categories.
- The Data compiled from both primary and secondary sources have been collated, analyzed and conclusions have been drawn with respect to efficacy of the QCS scheme during XI Five Year Plan. On the basis of the results of the evaluation study, measures have been suggested to enhance the effectiveness of the QCS scheme during XII Five Year Plan.

1.5 Sample Frame

The sample plan proposed by the NPC study team at the beginning of the study has been given in **Table 1.1**.

Table 1.1: Proposed Field Survey Plan

Places	SMOI Chapters	Silk Product Sellers	Silk Product Buyers	Personnel/ Scientists of Cocoon testing	Personnel/ Scientists of raw silk testing
Bangalore	1	15	15	1	1
Chennai	1	10	10	1	1
Coimbatore	1	5	5	1	1
Palakkad	1	5	5	1	1
Hyderabad	1	10	10	1	1
Mumbai	1	5	5	1	1
Kolkata	1	10	10	1	1
Guwahati	1	10	10	1	1
Varanasi	1	5	5	1	1
Lucknow	1	5	5	1	1
New Delhi	1	5	5	1	1
Panchkula	1	5	5	1	1
Srinagar	1	10	10	1	1
Total	13	100	100	13	13

During the conceptual stage of the study, NPC study team had only limited information regarding the implementation of the QCS scheme hence aforesaid sample was drawn on the assumption that every SMOI chapter has at least one cocoon testing and one raw silk testing centre. However, based on the ground realities, such as the discontinuation

of raw silk testing centre during the XI Five Year Plan, the sample has been modified. The actual field survey coverage has been given in **Table 1.2**.

Table 1.2: Actual Field Survey

S.No.	State	SMOI Offices	SMOI	Authorised user	Consumer & Retailers	Testing Center (Cocoon & Raw Silk)	Total
			QCS-01	QCS-02	QCS-03	QCS-04	
1	Karnataka	Bangalore	2	12	15	3	32
2	Andhra Pradesh	Hyderabad	2	10	10		22
3	Tamilnadu	Coimbatore			5		
		Chennai	2		10	1	18
4	Jammu & Kashmir	Srinagar	1	10	10	2	23
5	West Bengal	Kolkata	1		10	1	12
6	Uttar Pradesh	Varanasi			4		
		Lucknow	2	10	3	1	20
7	Maharashtra	Mumbai	1	6	2	0	9
8	Assam	Guwahati	1	10	11		22
9	New Delhi	New Delhi	1	5	5		11
10	Haryana	Panchkula	1	2	15		18
11	Kerala	Palakkad	1	3	2		6
		Total	15	68	102	8	193

Source: NPC Field Survey –August-Sept 2012

1.6 Outline of the Report

The evaluation study report has been prepared in five chapters. The first chapter provides the background for undertaking the study, its objectives and the methodology adopted. The overview regarding Quality Certification System Scheme has been discussed in detail in second chapter. Third chapter presents the field survey findings after detailed interviews of the thirteen Silk Mark Organizations of India, Cocoon Testing Centres, Raw Silk Testing Centres, Textile Testing Laboratories and Authorized Users and Consumers of Silk Mark products. The fourth chapter highlights the field survey findings and recommendations with a view to make the QCS scheme more effective during XII Plan period. The Fifth Chapter discusses the direction of the QCS scheme implementation during XII plan period.

CHAPTER II

QCS SCHEME- AN OVERVIEW

2.1 Background

Considering the globalization of textile trade, removal of trade barriers and the competition in domestic and export fronts, it was essential for India to initiate suitable measures for instilling quality assurance in the production chain. Quality assessment and quality certification are the main activities for quality assurance. Quality Certification System (QCS) scheme was launched to address the issue of quality in the production chain as well as for the generic promotion of silk.

Quality assessment during the process of production has been planned through ‘Raw silk testing centres’ as well as ‘Cocoon testing centres’. In order to instill the confidence regarding the quality of finished silk goods among the national and international consumers, a scheme “Silk Mark” was launched through the Silk Mark Organization of India (SMOI) under Central Silk Board as a part of Quality Certification System for the products made from pure natural silk.

2.2 Financial Outlay for QCS during XIth Plan period

Keeping in mind the importance of the sericulture towards rural sector development, high employment potential, high Exports potential several schemes have been implemented by Ministry of Textiles, Government of India through Central Silk Board (CSB). Quality Certification System is one the important schemes with a planned outlay of Rs. 13.66 Crores which was revised to Rs. 14.75 Crores for the XI plan period.

XI Plan Original Out lay (Rs. Crores)	2007-08 Actual(Rs. Crores)	2008-09 Actual(Rs. Crores)	2009-10 Actual(Rs. Crores)	2010-11 Actual(Rs. Crores)	2011-12 Actual (Rs. Crores)	Total expenditure for XI Plan(Rs. Crores)
13.66	1.82	2.00	3.33	4.61	2.99	14.75

Source: SMOI Office, Bangalore

Various activities being carried out under Quality certification system are being discussed in the following sections:

2.3 Functions of Raw Silk Testing Centres and Cocoon Testing Centres

The purpose of Cocoon Testing Center & Raw Silk Testing Center is to put in place a quality based pricing system to assure quality at different levels of production process and ensures production of quality cocoons and raw silk, which ultimately leads to production of quality products. This scheme aims to bring in quality awareness among the producers to get better returns for their produce, besides ensuring quality assurance to the buyers / consumers and increases the demand for Indian Silk both in domestic and International markets.

Cocoon testing is becoming more and more popular as both the farmers as well as reelers are finding it useful in their own ways. Farmers spare their cocoons as they find that the renditta assessment before auction can lead to transparency in transaction and also help them to rectify the possible mistakes in next rearing; it also helps them to improve the existing quality level of cocoons. It is to be noted that the cocoon testing is done in front of the farmers and while doing so the causes for occurrence of defective cocoons such as melt, double and flimsy cocoons are explained to them. This is having a good impact on the farmers as most of them realize their mistakes on the spot. These centres, apart from providing technical guidance to farmers for producing good quality cocoons, impart technical guidance and assistance to multi-end reelers to produce gradable silk yarn as well. Reelers too find it useful as they can purchase the raw material based on quality and pay fair price according to quality. Display of the test cards viz. defective cocoon %, Shell Ratio% and Estimated Renditta is very useful for the reelers who wish to produce better quality silk.

The Raw Silk testing centres carry out testing of raw silk for the benefit of farmers, reelers, twistors, traders, etc., The test results help the customers to know the quality of silk produced and also helps in bringing quality awareness among the farmers/reelers to produce required quality of silk in conformity to the requirement of Traders / Twistors and Weavers. During XI plan period, the component of Raw Silk Testing Centre was discontinued, however, the component of Cocoon testing centre has been sanctioned during the XI plan.

2.3.1 Achievements during XI plan viz. a viz Cocoon Testing Centres

During XI plan period, a total of Rs. 24 lakhs have been released for the establishment of 24 cocoon testing centres (CTC). Out of these 24 CTCs, seventeen have already been established and funds have already been released for the establishment of rest seven CTCs.

Table 2.1 : Progress of Procurement of CTC Equipments for Cocoon Testing Centres in Various states/places (As on September 2011)

Year	Unit Cost	Physical Target	Physical Achievement	State	Amount spent/released (Financial) (Rs. In lakhs)	Physical Progress/Remarks
2007-08	1.00	3	2	Palakkad - Kerala	2.00	Established & Functioning
				Mallapuram- Kerala		
2008-09	Do	4	4	Aizwal-Mizoram	4.00	Established & Functioning
				Hoshangabad - M P		
				Salem -TN		
				Mandi -HP		
2009-10	Do	5	4	Vaniyambadi-TN	4.00	Established & Functioning
				Hosur-TN		
				Bhilaspur-HP,		
				Chandragiri -Orissa		
2010-11	Do	6	7	Kuppam-AP	7.00	Established
				H.Junction -AP		
				Sangaipat - Manipur		
				Jammu – J&K		
				Srinagar-J&K		
				Madanapalli-AP		
				Balaghat - MP		
2011-12	Do	7	7	Vijaypura-Karnataka	7.00	Releases have been made for procurement of CTC equipments
				Shirahatti-Karnataka		
				Malavalli- Karnataka		
				H.Cross- Karnataka		
				Khalaichak-WB		
				Channapptana-Karnataka		
				Kanakapura-Karnataka		

Source: SMOI Office, Bangalore

2.4 Functions of Silk Mark Organization of India (SMOI)

SMOI is an initiative of Central Silk Board, Ministry of Textiles and Government of India. It is a registered society under Karnataka Society Act 1960. The Consumers and the genuine traders of silk had been demanding a measure from Central Silk Board for bringing in a fair practice in the Trade. Silk Mark was launched as a response to the demand on 17th June 2004 and is being promoted by SMOI. The scheme was introduced to protect all the consumers of silk, since many of them are ignorant about the purity standards. Adulteration of silk with other fibres and fabrics made of other fibres being sold as silk is a serious threat to the Indian consumer.

The major objectives of “Silk Mark” Scheme is

- To create awareness among the consumers about the purity and quality of silk product and instill confidence in them on the quality of product.
- Silk mark aims at the generic promotion of silk.
- It also aims at protection of the interests of the traders and manufacturers of pure silk.
- It also aims at building brand equity of Indian silk and at a cohesive campaign with all stakeholders in the silk value chain to promote silk

Besides gratifying the aforesaid objectives of Silk Mark, SMOIs are also involved in various export utility services such as pre-shipment inspection of silk goods for various types of certifications such as Hand woven certificates to EEC countries, Handicraft product certificates to EEC countries, Handicraft certificate to Australia, Swiss Tariff Certificate, Certificate of Origin, Special certificate of origin to U.A.E., Sri Lanka and Yugoslavia Silk Mark certificate etc.

Pre-shipment inspection of silk goods is now carried out on voluntary basis. Earlier the Pre-shipment Inspection was compulsory and the exporters use to get export incentives on the basis of these inspections, however, the compulsory Pre-shipment Inspection of Natural silk goods for export by CSB has been removed with effect from 01-04-2000 as per the direction of Ministry of Textiles. Thereafter, though CSB has continued to be inspection authority for silk goods, however, it is undertaking Voluntary quality inspection against payment of

service charges prescribed by the Board. SMOI chapters have 10 certification centers across India.

2.4.1 Organizational Structure SMOI

The Organizational Structure of SMOI includes three categories of members. These are: Permanent member, Special Member and Corporate members. Permanent members are the representatives from Govt. of India, Central Silk Board, ISEPC and other State Govt. Agencies. These members are not liable to retire by rotation and they assume the membership by virtue of their position in their respective Departments, Board and Govt. Agency. Chief Executive Officer of SMOI, who is a nominee of Central silk Board, looks after day to day administration of SMOI with a lean Corporate Office team stationed at Bangalore.

SMOI has thirteen regional chapters spread across the country. All the thirteen chapters with their geographical Jurisdiction have been discussed in **Table 2.2**.

Table 2.2: SMOI Chapters with their Geographical Jurisdiction

Sl. No.	Chapter Name	Geographical Jurisdiction
1	Bangalore	Karnataka
2	Chennai	Tamil Nadu (except the Districts of Nilgiris, Tirupur Coimbatore, Erode & Salem)
3	Coimbatore	Districts of Nilgiris, Tirupur, Coimbatore, Erode &
4	Hyderabad	Andhra Pradesh
5	Palakad	Kerala
6	Mumbai	Madhya Pradesh, Gujrat, Goa, Madhya Pradesh
7	Kolkata	West Bengal, Orissa, Bihar, Jharkhand
8	Guwahati	Assam & all other North-Eastern states
9	New-Delhi	Delhi, Uttranchal, Himachal Pradesh
10	Lucknow	Lucknow, Rajasthan, Chattisgarh
11	Varanasi	Uttar Pradesh (Except Lucknow)
12	Chandigarh	Haryana, Punjab
13	Srinagar	Jammu & Kashmir

2.4.2 Major Functions

The two major functions of SMOIs are making authorized Users and creating awareness among the general public regarding Silk Mark. Various activities undertaken by SMOIs are as follows:

Training Programmes: Training for Authorized Users and their sales persons are organized regularly for educating them about silk mark & its advantages, silk testing etc.

Awareness Programme: Awareness Programmes are organized for Women’s Club, Colleges, Fashion Institutes, Conferences and Consumer Groups.

Road Shows: Road Shows are organized in Malls, Public gathering, Silk Shopping area with mobile testing van/branded vehicle.

Workshops for AUs: Workshops are organized for manufacturers from silk clusters for improved work practices particularly wet processing to achieve wash fastness properties etc for their products

2.4.3 Achievements during XI plan viz. a viz. Silk Mark Organization of India

SMOIs have shown considerable growth during the XI plan period. More than 200 authorized users have been registered each year during the last plan period. The total number of authorized users registered all over India has grown up to 1999 since the year of inception of silk mark i.e. 2004. **Table 2.3** gives the detail regarding the year wise progress made by SMOIs in the various activities undertaken by them such as registration of authorized users, training of sales persons and distribution of silk mark label etc. during the last plan period.

Table 2.3: Physical Progress during XI plan

	A.U Registered	Training of Salespersons of A.U	Label Distribution (in lakhs)	Programme/ Events
2007-08	218	325	18.86	184
2008-09	292	654	21.29	262
2009-10	298	386	22.22	410
2010-11	301	920	27.63	363
2011- 12	301	2227	26.00	526
Total	1410	4512	116	1745

Source: SMOI Office, Bangalore

Organization of Silk mark expo is one of the major activities undertaken by the various SMOI chapters. A total of 60 silk mark expos have been successfully organized during the last plan period. The detail regarding these silk mark expos have been given in the **table 2.4**.

Table 2.4: Silk Mark Expos – (Progress at a glance)

Year	No. of Expos conducted	No. of stalls	No. of visitors (in lakhs)	Business transaction (Rs. in crore)
2008-09	11	514	1.75	26.00
2009-10	16	725	1.87	34.93
2010-11	16	840	1.71	33.25
2011-12	17	905	1.72	37.76
TOTAL	60	2984	7.05	131.94

Source: SMOI Office, Bangalore

2.5. Conclusion

The Progress of SMOIs and Cocoon testing centers under QCS scheme have been smooth over the years during the last plan period. Financial allocation have been made for 24 CTCs, which include 2 CTCs in North eastern region, 6 in Karnataka, 3 in Andhra Pradesh, 2 each in Kerala, Madhya Pradesh, J&K and HP and 1 each in Orissa and west Bengal. Around 17 centers out of 24 have already started working. The SMOIs have also shown considerable progress and the number of authorized users registered till date has grown up to 1999. Since the component of Raw Silk Testing Centre has been discontinued during the last plan period, hence, not much growth has been registered in concern with raw silk testing centres.

CHAPTER III

FIELD SURVEY FINDINGS – QCS SCHEME DURING XI PLAN

3.1 Introduction

This chapter evaluates the implementation of Quality Certification System scheme on various parameters. Information and data compiled from both primary and secondary sources of data have been utilized for the analysis. Field Surveys have been conducted across all the thirteen SMOI chapters through structured questions (Annexure 1.1). Efforts have been made to cover the raw silk testing centres as well as cocoon testing centers through structured questionnaire (Annexure 1.2). The authorized users of the silk mark have been randomly selected from the list of authorized users collected from the concerned SMOI Chapters and personally interviewed with questionnaires (Annexure 1.3). The retailers and the consumers have been selected at random from the areas of Jurisdiction of these SMOI chapters and interviewed (Annexure 1.4).

Present chapter has been divided into four major sections. The first section analyses the field survey observations concerned with the SMOIs, second section deals with primary level data analysis concerned with the Raw Silk Testing Centres and Cocoon testing centres. Third section analyses the field survey observations of Authorized users and fourth section analyses the field survey findings of retailers and consumers of silk products.

SECTION I: SMOI

3.1.1 Evaluation of Silk Mark Organization of India

The objective of “Silk Mark” Scheme is to create awareness among the consumers about the purity and quality of silk product and instill confidence in them on the quality of product sold with “Silk Mark Label”. The scheme envisages protection of the consumers’ interest so as to ensure that one is able to buy genuine silk product. Another focus area of the scheme is generic promotion of the Indian silk. Any person or company who is a manufacturer, trader or exporter of silk products can become an authorized user of the silk mark label. Once they become the authorized user, they are trained in testing of silk and are authorized to use the Silk Mark Label on their pure silk products. “Silk Mark” would be a symbol of “Purity of Silk” and uphold its sanctity. Silk Mark products vouch for 100% purity in silk. The

Authorized User shall be responsible for purity and quality of the product as laid down in the scheme.

The Authorized Users have certain facilities and follow quality standards as specified in the set procedure. The validity of the license issued to the Authorized Users is of one year from the date of registration, which can be renewed further on yearly basis or with the provision of renewing once in five years. The Certifying Authority (SMOI) has the right to cancel the license, if the authorized users fail their commitments to maintain and follow quality standards.

A total of 1999 Authorized Users of Silk Mark has been registered with the SMOIs since its inception in the year 2004. The Silk Mark label has multiple benefits for the authorized users as they not only gain the confidence of their customers but also get an edge over their competitors.

Table 3.1 provides details regarding the total number of authorized Users registered with various SMOI Chapters during the XI Five Year Plan.

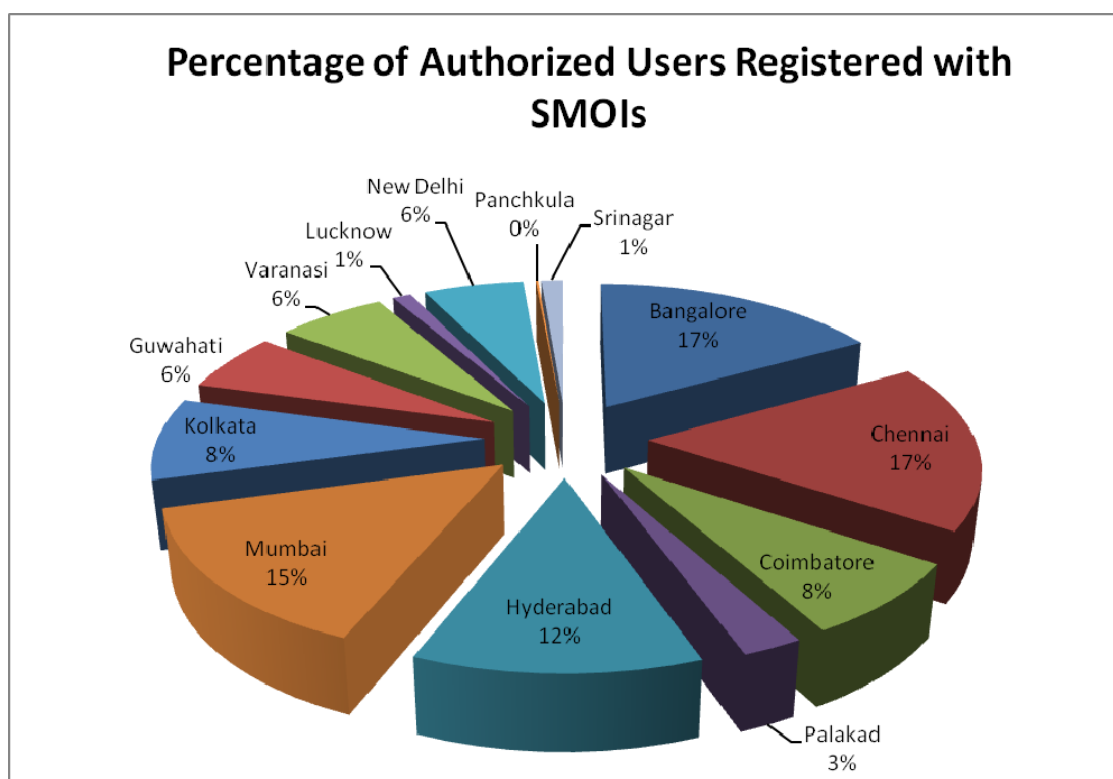
Table 3.1: Total Number of Authorized Users

S.No	SMOI Chapter	2007-08	2008-09	2009-10	2010-11	2011-12	Total
1	Bangalore	35	37	33	62	70	237
2	Chennai	52	60	35	56	41	244
3	Coimbatore	92				15	107
4	Palakad	4	5	8	9	9	35
5	Hyderabad	26	35	68	18	18	165
6	Mumbai	48	37	44	32	44	205
7	Kolkata	10	34	33	22	20	119
8	Guwahati	24	16	17	10	18	85
9	Varanasi	8	30	14	18	19	89
10	Lucknow	-	-	2	6	7	15
11	New Delhi	-	-	32	25	25	82
12	Panchkula	-	-	-	1	1	2
13	Srinagar	7	4	3	3	1	18
14	All India	214	258	289	354	288	1403

Source: NPC Field Survey –August-Sept 2012

It may be noted that the performance of the thirteen SMOI chapters is highly skewed with regard to the number of authorized users registered with them. Almost 34% of the authorized users are associated with the two south Indian States i.e. Tamil Nadu and Karnataka. This may be owed to the reason that Chennai accounts for a large volume of Silk trade in our country. However, it seems that there is still scope to harness potential clients at least with the traditional states.

Fig. 3.1: Authorized Users registered with SMOIs Chapters



Source: NPC Field Survey –August-Sept 2012

The number of authorized users registered with SMOI Chapters may also be the result of the promotional activities taken up by these SMOI Chapters. It is evident from **Table 3.2** that Chennai Chapter had taken up a maximum of 552 promotional activities since its inception followed by Bangalore with 490 and Mumbai with 290 activities.

Table 3.2: Awareness programmes organized by SMOI Chapters since inception

Sr. No.	Chapter	Awareness programmes Workshops/ Seminars/Exhibitions/Road Shows since inception
1	Bangalore	490
2	Chennai	552
3	Coimbatore	54
4	Hyderabad	68
5	Palakkad	35
6	Mumbai	280
7	Kolkata	90
8	Guwahati	217
9	New-Delhi	52
10	Lucknow	26
11	Varanasi	68
12	Chandigarh(Panchkula)	4
13	Srinagar	43
	TOTAL	1979

Source: SMOI Office, Bangalore

3.1.2 Promotional Programmes Organized by SMOI Chapters during XI Five Year Plan

Several promotional activities have been carried out by the SMOI chapters during the XI Five Year Plan to enhance the awareness about “silk mark” among the traders as well as consumers. As per the data received from the thirteen SMOI Chapters, it has been observed that a total 1745 events have been organized by them during the XI Five Year plan (**Table 3.3**).

Table 3.3: Events organized by SMOI Chapters during XI Five Year Plan

Year	Programme/ Events
2007-08	184
2008-09	262
2009-10	410
2010-11	363
2011-12	526
TOTAL	1745

Source: SMOI Office, Bangalore

Besides these programmes, a total of 60 silk mark expos have been organized which attracted around seven lakh fifty thousand visitors (**Table 3.4**). Silk Mark Expos are the flagship event being organized by SMOIs. These expos are acting as the major source of awareness for the common people at large regarding the silk mark. It is also helping in promoting the brand 'Indian silk' among the global consumers.

Table 3.4: Expos conducted by SMOI Chapters during XI Five Year Plan

Year	No. of Expos conducted	No. of visitors (in lakhs)	No. of visitors per fair (Nos)
2008-09	11	1.75	159091
2009-10	16	1.87	116875
2010-11	16	1.71	106875
2011-12	17	1.72	101176
TOTAL	60	7.05	117500

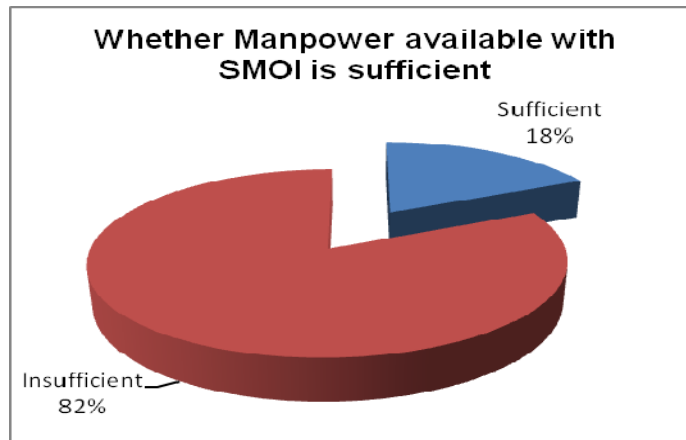
Source: SMOI Office, Bangalore

From the table 3.4, it is evident that the number of visitors per fair has declined during the last four years through the number of Expos have gone up.

Efforts are needed to publicize the event vigorously so that the credibility of these Expos may be established among the silk producers, traders, authorized users as well as common people as a whole and could attract more and more visitors in future. In the present day scenario, the SMOIs should direct all their strengths towards publicity of their events. Silk Mark, in turn, will get the requisite lime light.

3.1.3. Manpower Strength of various SMOI Chapters

As discussed earlier in this chapter, major activity associated with silk mark scheme is to build awareness about the silk mark. To achieve the targeted awareness level during the next plan period, vigorous extension work is needed. However, as per NPC field survey, almost 82% of SMOI Chapters report that they face shortage of man-power to carry out promotional and extension activities.

Figure 3.2: Manpower Availability with SMOI Chapters

Source: NPC Field Survey –August-Sept 2012

Efficient management of personnel's is very important for achieving the target set for SMOIs. The thirteen SMOI chapters are being managed by 25 Assistant Directors, 4 Deputy Directors and 6 Extension Officer/ Support staffs etc (Table 3.5).

Table 3.5: NUMBER OF EMPLOYEES IN SMOI CHAPTERS

S.No	SMOI Chapter	Director	Joint Director	Deputy Director	Assistant Director	Extension Officer/ Quality Inspector/ Supporting Staff	Total
1	Bangalore	-	-	1	4	-	5
2	Chennai	-	-	1	4	-	5
3	Coimbatore	-	-	-	1	-	1
4	Palakkad	-	-	-	1	1	2
5	Hyderabad	-	-	-	3	-	3
6	Mumbai	-	-	1	2	2	5
7	Kolkata	-	1	-	3	2	6
8	Guwahati	-	-	-	1	-	1
9	Varanasi	-	-	1	1	-	2
10	Lucknow	-	-	-	1	-	1
11	New Delhi	-	-	-	2	-	2
12	Panchkula	-	-	-	1	-	1
13	Srinagar	-	-	-	1	1	2
	Total	0	1	4	25	6	36

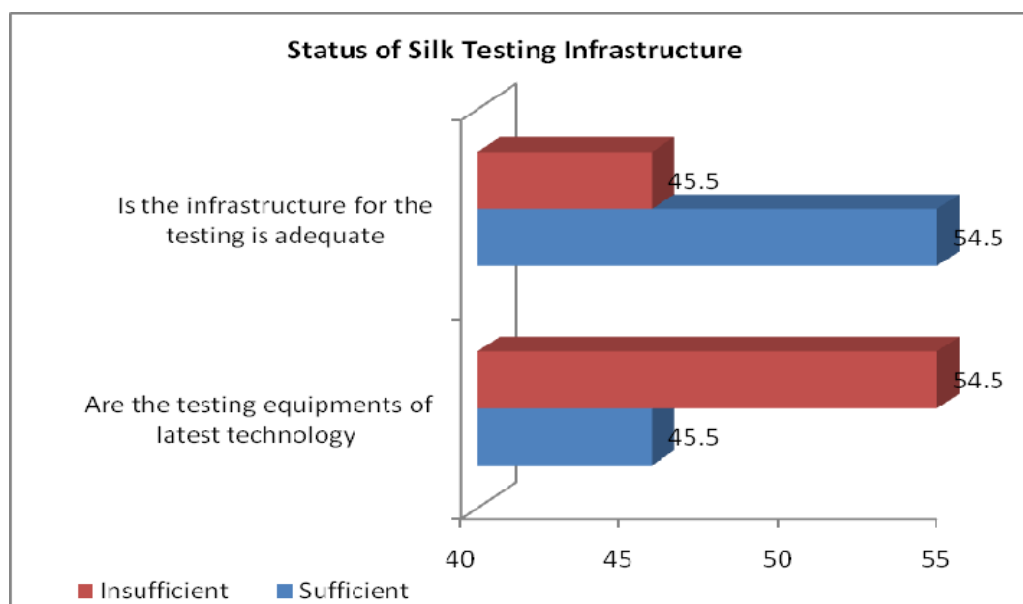
Source: NPC Field Survey –August-Sept 2012

At some of the SMOI chapters, no separate staff strength has been dedicated for the SMOI work and CSB officials are taking care of the SMOI work also. As already discussed, the promotional activities and extension work results in direct increase in the number of authorized users, hence, the SMOIs need to increase their activities in the coming years. Considering the volume of promotional and extension activities to be managed by these SMOIs, the work force at these chapters need to be rationalized. It may be noted that the SMOI Chapter that has about 60% total authorized users in India i.e. SMOI Chennai Chapter has been manned by only 5 employees whereas the SMOI Chapter Kolkata having only 4% authorized users and has very little activities is manned by 6 employees.

3.1.4 Infrastructure and testing facilities available with SMOIs

Availability of infrastructure plays a crucial role in accomplishing the objective of SMOIs. NPC Field Survey findings reveal that 54.5% SMOIs does not have testing equipments of latest technology whereas 45.5% admit that the infrastructure available for testing is not adequate.

Figure 3.3: Status of Silk Testing Infrastructure with SMOIs



Source: NPC Field Survey –August-Sept 2012

However, there is general satisfaction regarding the quality parameters and tests undertaken by these SMOIs and around 91% of SMOIs have responded that the tests carried out by them are adequate.

Figure 3.4 Adequacies of Tests for Quality Certifications

Besides the awareness programmes, certain quality certifications are also provided by these SMOI chapters. The quality certifications provided at various SMOI chapters are given in

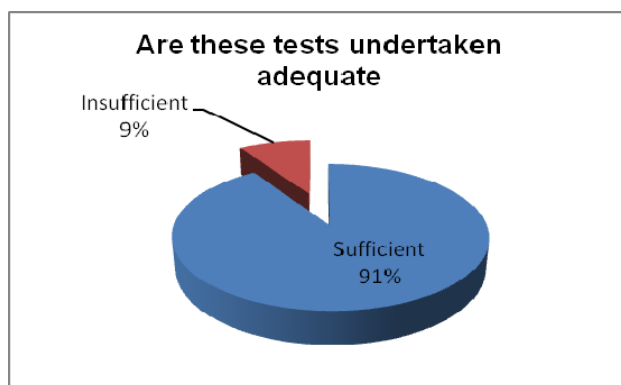


Table 3.6. Except three SMOI chapters

Source: NPC Field Survey –August-Sept 2012

such as Coimbatore, Palakkad and Panchkula all other SMOI Chapters provide Quality certifications. Among the SMOI Chapters Varanasi Chapter

provides the maximum number of certificates i.e. eight whereas Hyderabad and Lucknow SMOI Chapters provide only one quality certification. Among the quality certificates, “Silk Mark” certificate is provided by nine SMOI Chapters and the next highest demanded certificate is “certificate of origin” (8 SMOI Chapters), “Handicraft Product certificate” to EEC Countries (7 SMOI Chapters).

Table 3.6 TYPE OF QUALITY CERTIFICATION PROVIDED

S. No	Certification / States	Hand woven certificate to EEC countries	Handicraft product certificates to EEC countries	Handicraft certificate to Australia	Swiss Tariff certificate	Certificate of origin	Special certificate of origin to U.A.E., Sri Lanka and Yugoslavia	Silk Mark Certificate	Any Other certification (Please specify)	Total (Nos)
1	Bangalore	Y	Y	-	-	Y	-	Y	Y	5
2	Chennai	Y	Y	-	Y	Y	-	Y	Y	6
3	Coimbatore	-	-	-	-	-	-	-	-	0
4	Palakkad	-	-	-	-	-	-	-	-	0
5	Hyderabad	-	-	-	-	-	-	Y	-	1
6	Mumbai	Y	Y	-	Y	Y	Y	Y	Y	7
7	Kolkata	Y	Y	-	Y	Y	-	-	Y	5
8	Guwahati	-	-	-	-	Y	-	Y	Y	3
9	Varanasi	Y	Y	Y	Y	Y	Y	Y	Y	8
10	Lucknow	-	-	-	-	-	-	Y	-	1
11	New Delhi	Y	Y	-	Y	Y	-	Y	Y	6
12	Panchkula	-	-	-	-	-	-	-	-	0
13	Srinagar	-	Y	Y	-	Y	-	Y	-	4
	Total (Nos)	6	7	2	5	8	2	9	7	46

Source: NPC Field Survey –August-Sept 2012

The promotional activities as well as quality certification and textile testing work needs to be supported with adequate work force and infrastructure. During the eleventh plan period SMOIs have shown considerable increase in their activities and silk mark is capturing silk market slowly but steadily.

SECTION –II

2.2 Cocoon Testing & Raw Silk Testing Centres

The Raw Silk & Cocoon Testing Centres are established for testing raw silk and cocoon samples for the benefit of farmers, reelers, twistors, traders, etc. Cocoon Testing Centers are usually established in cocoon markets and carrying out specific tests to find out defective

cocoon %, shell ratio% and renditta assessment for the cocoons. Whereas, Raw Silk Testing Centers are mainly associated with CSTRl and SctH and carrying out tests for assessing quality of raw silk. Denier testing, Limited parameter test, warp weight testing and twist testing are major tests carried for grading the raw silk as per their quality.

The purpose of establishing Cocoon Testing Center & Raw Silk Testing Center was to put in place a quality based pricing system to assure quality at different levels of production process. Only three Raw silk testing centres (RSTCs) have been established so far and rest of raw silk testing work is taken care of by Silk Conditioning & Testing House (SctH) and CSTRl.

A test card is prepared by testing centres and put over the cocoon lot. This certifies quality of cocoon on the basis of estimated renditta. This certification enables the farmers to get better price for their cocoon in the market as the Reelers see the renditta from the cocoon lot and on the basis of that they negotiate price with the cocoon growers.

3.2.1 Coverage of testing Centres

During XI plan period, funds have been released for the establishment of 24 new cocoon testing centres, out of which 17 have already started functioning. As the component of raw silk testing centre was dropped during the last plan period, hence, the survey findings are based on the progress during the previous plan period only.

NPC study team gathered the information regarding effectiveness of various testing centres through structured questionnaires. A total of eight testing centres were covered which included two Raw Silk Testing Centres from the state of Karnataka, two Cocoon Testing Centres from the states of Karnataka and Tamil Nadu, three silk conditioning and testing houses (SctH) in the state of Jammu and Kashmir and West Bengal and one Textile Testing Laboratory in the state of Uttar Pradesh. The details of testing centres covered during field study are given in the following **Table 3.7**.

Table 3.7: Testing Centres Covered

Sr. No.	Testing Centres	State	Nos.
1	Raw Silk Testing Centres	Karnataka	2
2	Cocoon Testing Centres	Karnataka	1
		Tamil Nadu	1
3	Silk Conditioning and Testing House (SCTH)	Jammu and Kashmir	2
		West Bengal	1
4	Textile Testing Laboratory	Uttar Pradesh	1
Total			8

In order to understand the working adequacy of infrastructure and testing facilities available and impact of these testing centres, information has been collated on various parameters like availability of adequate infrastructure and testing facilities, procedure adopted and tests carried out for testing quality of Cocoon/Raw Silk, availability of skilled manpower etc. Suggestions for possible areas of improvements in the QCS scheme during XII Five Year Plan were also sought.

3.2.2 Assistance under QCS

The Role of DOS is very limited as the testing centres covered come under Central Silk Board (CSB). However, none of the eight testing centres covered has received any assistance on CSB under QCS.

3.2.3 Procedure adopted for carrying out tests

Cocoon testing centres generally find out defective cocoon % and shell ratio from one Kg of cocoon from the farmers and estimate renditta of cocoon. Whereas, Raw silk testing centres carry out various types of quality parameters tests to identify Denier, evenness, neatness, cleanness, cohesiveness and elongation etc. of the raw silk yarn.

3.2.4 Infrastructure and testing facilities available with the Testing centres

To assess the availability of adequate infrastructure as well as availability of testing equipments with latest technology, information has been gathered from testing centres. SCTH has not expressed any shortage of infrastructural and testing facilities and are equipped with latest machineries. CTC are having shortage of equipments as the cocoon testing centres at Ramnagaram cocoon market, Karnataka opined lack of infrastructure particularly the reeling devices. The reeling devices would help in calculating actual renditta and would help in increasing transparency in transaction of cocoons. The Raw Silk testing centres and Textile Testing Laboratory are facing infrastructural constraints with regard to bigger space and latest machineries. The **table 3.8** provides details regarding adequacy of Infrastructure and testing facilities available with the centres

Table 3.8: Adequacy of Testing infrastructure and equipments

Particulars	CTC	RTC	SCTH	TTL
Testing equipments with latest technology	Inadequate	Inadequate	Adequate	Inadequate
Infrastructure for the testing	Inadequate	Inadequate	Adequate	Inadequate
Infrastructure to cater to the testing requirements of the cluster/district/state	Inadequate	Inadequate	Adequate	Inadequate

Source: NPC Field Survey –August-Sept 2012

3.2.5 Availability of skilled man power

To assess the availability of man power for administrative works as well as for carrying out various quality parameter tests, information has been gathered from the testing centres. It can be seen from the table that SCTH and TTL have expressed sufficiency of manpower for the administrative as well as testing works, however, RSTCs and CTC are both facing shortage of skilled manpower as well as manpower for administrative works.

Table 3.9: Manpower Availability

Particulars	CTC	RSTC	SCTH	TTL
Availability of manpower	Inadequate	Inadequate	Adequate	Adequate
Sufficiency of skilled manpower	Inadequate	Inadequate	Adequate	Adequate

Source: NPC Field Survey –August-Sept 2012

3.2.6 Suggestions

On the basis of the field survey and analysis, certain areas of improvement identified for the testing centres have been discussed below:

- The Cocoon Testing Centres and the Raw Silk Testing Centres should be equipped with adequate infrastructure and machineries of latest technology so that their services could be utilized to put in place quality based pricing system on a wider scale.
- The cocoon testing centres need to be equipped with reeling devices and skilled manpower so that they can give actual renditta in place of estimated one.
- The raw silk testing centres and textile testing laboratories should be provided sufficient space so that they can carry out their testing activities comfortably.

SECTION III

3.3 Authorized Users

In order to protect and uphold the purity and sanctity of silk from the onslaught from unethical trade practices, the Silk Mark Organization of India has enroll Authorised Users so that only Silk Mark labeled products reach in the market. Manufacturers, Exporters, Brands, Retailers and Designers of Silk get an edge over competitors by becoming an Authorised User of Silk Mark. All the Authorised Users i.e. manufacturer, exporter, retailer or brand for pure, natural silk products get the right to affix Silk Mark label on their products in addition to brand or company logo. Silk Mark Organization of India has over 2000 Authorized Users (AUs) across the country as per Business Standard News paper dated Oct 12th 2012. As per NPC Field Survey during August-October 2012 across all the 13 SMOI Chapters, the total numbers of AUs are 1999.

To evaluate the success of Silk Mark Label and its demand among the AUs, feedback was collected from AUs through a structured personal interview (Annexure 3.2) covering aspects like retaining customer's confidence, positioning high quality, genuine silk seller, gaining more customers, more sales, more profits, more prestige and getting the technical support from SMOI and its silk testing laboratories in major cities and silk clusters in selected sample states. Some other aspects like difficulties in obtaining silk mark, awareness regarding quality checks and possible areas for improvement etc were also discussed during field survey.

3.3.1 Coverage of the Authorized Users

Authorised Users were interviewed with structured questionnaire to access the promotion of Indian silk by displaying Silk Mark logo. A total of 94 Authorized Users were personally contacted in 13 major cities and silk clusters in selected sample states. About 90% of the users contacted have obtained silk mark within the last five years only. The details of state wise Authorised Users contacted during field study are given in the following **Table 3.10**.

Table 3.10: Number of Authorized Users covered

S.No	Places Covered	Number of Authorized Users
1	Bangalore	15
2	Chennai	10
3	Coimbatore	5
4	Palakkad	3
5	Hyderabad	10
6	Mumbai	6
7	Kolkata	8
8	Guwahati	10
9	Varanasi	8
10	Lucknow	2
11	New Delhi	5
12	Panchkula	2
13	Srinagar	10
Total		94

3.3.2 Demand for the Silk Mark products

It has been observed that all Manufacturers, Exporters, Brands, Retailers are not Authorised Users of silk mark. In practice a relatively small segment in the country are Authorised Users of silk mark. This may be because of lack of demand of silk mark products. The study had tried to examine the phenomenon by gathering information on total silk output compared with Silk Mark certified output of Authorised Users. The Users were posed certain questions in order to visualize the impact on demand due to silk mark certification.

As many as 65 percent of Authorised Users were affirmative that demand for their products had increased after getting Silk Mark Certification. But it is very surprising that the percentage increase in demand for majority of Authorized Users is less than 25 percent. It can be seen from the **Table 3.11** in cities like Coimbatore ,Lucknow, Kolkata and Srinagar increase in product demand after getting Silk Mark Certification is relatively more than other cities. Ignorance about silk mark has been cited as one of the major reasons for the lack of demand for silk mark labeled products by majority of the Authorized users.

Table 3.11: Increase in product demand after getting Silk Mark Certification

S.No	Places	Response (%)			
		1-25%	26-50%	51-75%	76% & Above
1	Bangalore	66.7	-	33.3	-
2	Chennai	66.7	11.1	22.2	-
3	Coimbatore	60	-	40	-
4	Palakkad	100	-	-	-
5	Hyderabad	71.4	14.3	14.3	-
6	Mumbai	40	20	-	20
7	Kolkata	42.9	42.9	-	14.2
8	Guwahati	40	30	20	10
9	Varanasi	100	-	-	-
10	Lucknow	-	100	-	-
11	New Delhi	75	25	-	-
12	Panchkula	100	-	-	-
13	Srinagar	40	60	-	-

Source: NPC Field Survey –August-Sept 2012

NPC field survey finding reveals that despite obtaining Silk mark 3 years ago, majority of the AUs have only less than 25 percent of their Silk Mark output certified as compared to total silk output. As can be seen from the **Table 3.12** that the share of Silk Mark labeled

product sale to total silk product sale in southern cities mainly varies between 26-50 percent whereas in cities like Kolkata and Srinagar it is more than 75 percent.

Table 3.12: Share of Silk Mark labeled product sale to total silk product sale

S.No	Places	Response (%)			
		1-25%	26-50%	51-75%	76% & Above
1	Bangalore	14.3	57.1	14.3	14.3
2	Chennai	40	60	-	-
3	Coimbatore	40	60	-	-
4	Palakkad	66.7	33.3	-	-
5	Hyderabad	10	50	20	-
6	Mumbai	33.3	-	16.7	16.7
7	Kolkata	12.5	-	25	62.5
8	Guwahati	10	-	20	70
9	Varanasi	60	-	-	40
10	Lucknow	100	-	-	-
11	New Delhi	20	-	40	40
12	Panchkula	50	-	-	50
13	Srinagar	-	-	10	90

Source: NPC Field Survey –August-Sept 2012

Increase in demand for Silk Mark products by customers has been verified through structured personal interview of customers from the sales outlets of AUs, it is important to know the percentage of customers looking for silk mark products, therefore information was also gathered from authorized users regarding customers who are looking for Silk Mark products. It is evident from **Table 3.13** that Customers looking for Silk Mark Products are less than 50 percent in all most all the cities except Panchkula, Kolkata and Hyderabad.

Table 3.13: Customers looking for Silk Mark Products

S.No	Places	Response (%)			
		1-25%	26-50%	51-75%	76% & Above
1	Bangalore	86.6	13.3	-	-
2	Chennai	50	50	-	-
3	Coimbatore	-	100	-	-
4	Palakkad	100	-	-	-
5	Hyderabad	33.3	33.3	33.4	-
6	Mumbai	60	-	40	-
7	Kolkata	37.5	12.5	37.5	12.5
8	Guwahati	50	20	10	20
9	Varanasi	83	-	17	-
10	Lucknow	100	-	-	-

11	New Delhi	25	50	25	-
12	Panchkula	50	-	50	-
13	Srinagar	30	40	-	30

Source: NPC Field Survey –August-Sept 2012

3.3.3 Impact of Silk Mark

Since AUs were not willing to share the information related to the values of exports, domestic sales and turnover, similar information was also sought in a different manner to see whether Silk Mark certification has any positive impact. The information was sought on four major areas namely: Increased Exports, Increased Domestic Market, Better Quality of Silk and Increased Turnover. All most 80 percent of users were unanimous on the opinion Silk Mark improved the quality of their products but w.r.t increase in exports, very few expressed any impact. However, a substantial number of users have opined that there is an increase in domestic sales and turnover.

It may be seen from **Table 3.14** that some of the users have given their responses in more than one area of impact. Many of respondents opined that Silk Mark certification has resulted in increase of domestic sales and Better Quality of Silk followed by increase in turnover.

Table 3.14: Impact of Silk Mark on Silk related Activities

S.No	Places	Response (%)				
		Increased Export	Increased Domestic Market	Better Quality of Silk	Increased Turnover	Any Other
1	Bangalore	-	30		10	60
2	Chennai	10	10	50	30	-
3	Coimbatore	-	-	40	60	-
4	Palakkad	-	-	66.7	-	33.3
5	Hyderabad	-	30	50	-	20
6	Mumbai	-	80	20	-	-
7	Kolkata	-	75	-	25	-
8	Guwahati	-	80	70	80	-
9	Varanasi	-	57.1	28.6	14.3	-
10	Lucknow	-	100	-	-	-
11	New Delhi	33.3	66.7	-	-	-
12	Panchkula	50	50	-	-	-
13	Srinagar	-	40	10	50	-

Source: NPC Field Survey –August-Sept 2012

3.3.4 Difficulties in Obtaining Silk Mark and awareness about Silk quality checks

Besides collecting views on advantages of Silk Mark certification, we have also collected information on difficulties faced in obtaining the silk mark as well as awareness of quality checks. Only 10% of users expressed any difficulty in obtaining Silk Mark whereas about 16% of users are unaware of the requirement of quality checks for obtaining Silk Mark.

3.3.5 Areas of Improvement for certification process during XII Five Year Plan and promoting Silk Mark in India

Information was sought for possible areas where improvements are required in the certification process during XII Five Year Plan. There are no suggestions from AUs in improving the certification process as majority of them feel that the process is very simple and there is no difficulty as of now. However, almost everyone was in agreement for increasing awareness of Silk Mark through various promotional campaigns. Some of the major steps suggested by Users for promoting Silk Mark in India are:

- Increasing awareness through banners, advertisement in electronic and print media at state and national level, road shows and display at expo, exhibition etc
- Silk Expo's at hotels and malls
- Increase the duration of silk mark expo
- Issue separate mark for muga silk
- Regular inspection and quality check by SMOI
- Promotion of the names of users/members establishments in print and electronic media
- Silk mark should be made compulsory
- Penalties for not adhering to quality standards
- More funds for awareness campaigns

SECTION IV

3.4 Consumers of Silk Products

One of the primary objectives of Silk Mark is to protect the interests of consumers. The Consumer of Silk has long been having a difficulty of identifying the pure silk from the host of other fibres, just like the Consumer of Gold in finding the purity of Gold. The Consumers and the genuine traders of silk had been demanding a measure from Central Silk Board in

bringing in a fair practice in the Trade. Silk Mark was launched on 17th June 2004 as a response to the demand. In order to ensure high security, a fusion label embedded with nano particles, has been introduced. This form of labelling method makes the label printed on the product and unlike the paper hang tags cannot be removed and affixed on another product. Similar to the Authorized users the usefulness of Silk Mark Label and its effectiveness among the consumers has also been evaluated on various aspects. The information has been gathered on the awareness level, price difference, quality and difficulties; if any while purchasing silk mark products in major cities and silk clusters at all the SMOI chapters. Suggestions for promoting Silk Mark in India during XII Five Year Plan were also sought during field survey. The field survey was conducted through a structured questionnaire (Annexure 1.4).

3.4.1 Coverage of the Field Survey

Consumers were selected on the basis of stratified sample from customers who were coming for purchasing silk products from Authorized users. A total of 102 consumers were personally contacted in 13 major cities where SMOI chapters are located. As high as 85% of the consumers contacted have expressed the opinion that they have started buying products with silk mark only five years back. The details of state wise consumers contacted during field study are given in the **Table 3.15**.

Table 3.15: Number of Consumers covered under field Survey

S.No	Places Covered	Number of Consumers
1	Bangalore	15
2	Chennai	10
3	Coimbatore	5
4	Palakkad	2
5	Hyderabad	10
6	Mumbai	2
7	Kolkata	10
8	Guwahati	11
9	Varanasi	4
10	Lucknow	3
11	New Delhi	5
12	Panchkula	15
13	Srinagar	10
	Total	102

Source: NPC Field Survey –August-Sept 2012

3.4.2 Awareness of the silk mark based products

Although Silk Mark was launched in 2004, awareness regarding silk mark products among end-users is very limited. Our field survey finding reveals that consumers are generally not aware of availability of type of silk mark products. **Table 3.16** captured the information on awareness of silk mark products by consumers from multiple sources. The result of our analysis shows that Newspaper, TV, Colleagues/Partners, Internet/Website and SMOI/Govt. Officials are the main sources of information about Silk Mark products. Exhibition/Fair is another source of information for generating awareness among consumers.

Table 3.16: Source of Information for the consumers (Percent)

S.No	Places	Response (%)								Total
		News paper	TV	Colleagues/Partners	Internet/Website	SMOI/Govt. Officials	Customers	Magazines	Any Other source	
1	Bangalore	38.5	30.8	7.7	-	38.5	-	7.7	7.7	100
2	Chennai	20.0	50.0	20.0	-	-	10.0	-	-	100
3	Coimbatore	-	50.0	-	-	-	50.0	-	-	100
4	Palakkad	50.0	-	-	-	-	-	50.0	-	100
5	Hyderabad	-	-	10.0	10.0	40.0	20.0	-	20.0	100
6	Mumbai	-	10.0	10.0	40.0	-	-	-	-	100
7	Kolkata	37.5	12.5	-	12.5	25.0	-	-	12.5	100
8	Guwahati	9.1	-	18.2	-	36.4	9.1	9.1	18.2	100
9	Varanasi	-	20.0	50.0	20.0	-	-	-	-	100
10	Lucknow	-	20.0	10.0	40.0	-	-	-	-	100
11	New Delhi	-	-	20.0	-	60.0	-	-	20.0	100
12	Panchkula	-	-	66.7	-	-	-	-	33.3	100
13	Srinagar	-	-	66.7	-	-	-	-	33.3	100

Source: NPC Field Survey –August-Sept 2012

3.4.3 Quantity of Silk Mark based products

Since most of the Retailers/ Authorized Users selling silk products with both silk mark as well as without silk mark, therefore the consumers coming for buying silk products may or may not be buying silk mark based products only. However, the study team interacted with the consumers who were coming only for buying silk mark products. About 60 percent of consumers interviewed were those who were always buy silk mark products. It can be inferred from the **Table 3.17** that among all the 13 SMOI chapters visited by study team, only in four cities viz: New Delhi, Panchkula, Guwahati and Srinagar, percentage of silk mark based products purchased by consumers is more than 50% to the total silk products purchased.

Table 3.17: Quantity of Silk mark based products purchased vis-a-vis non silk mark products

S.No	Places	Response (%)			
		1-25%	26-50%	51-75%	76% & above
1	Bangalore	50.0	33.3	16.7	-
2	Chennai	70.0	30.0	-	-
3	Coimbatore	60.0	40.0	-	-
4	Palakkad	100.0	-	-	-
5	Hyderabad	11.1	55.6	11.1	22.2
6	Mumbai	50.0	50.0	-	-
7	Kolkata	12.5	12.5	37.5	37.5
8	Guwahati	27.3	18.2	9.0	44.5
9	Varanasi	100.0	-	-	-
10	Lucknow	-	100.0	-	-
11	New Delhi	-	-	-	100.0
12	Panchkula	25.0	-	50.0	25.0
13	Srinagar	25.0	-	50.0	25.0

Source: NPC Field Survey –August-Sept 2012

3.4.4 Quality of Silk Mark based products

Consumers are quite quality conscious while buying silk products, to understand the features of quality of silk mark based products to non silk mark products, information has been sought on different aspects. Some of the consumers have given their responses on more than one aspect, as expected majority of the consumers were of the opinion that Better Quality and Better Fabric are the main aspects differentiating silk mark based products from non silk mark products. However, as is evident from **Table 3.18** consumers in cities like Guwahati

and Panchkula have also expressed Durability and Comfort as important better quality aspects of silk mark based products vis-a-vis non silk mark products.

Table 3.18: Aspects differentiating Silk mark based products vis-a-vis non silk mark products

S.No	Places	Response (%)						
		Better Quality	Better Fabric	Durability	Comfort	More Eco Friendly	Better Marketability (Demand)	Others
1	Bangalore	58.3	25.0	8.3	-	-	-	8.3
2	Chennai	30.0	70.0	-	-	-	-	-
3	Coimbatore	40.0	40.0	20.0	-	-	-	-
4	Palakkad	-	50.0	-	-	-	-	50.0
5	Hyderabad	90.0	10.0	-	-	-	-	-
6	Mumbai	-	-	-	-	-	-	-
7	Kolkata	-	33.3	-	22.2	-	44.4	-
8	Guwahati	28.6	31.4	17.1	11.3	5.7	5.7	-
9	Varanasi	-	-	-	-	-	-	-
10	Lucknow	-	-	-	-	-	-	-
11	New Delhi	100.0	100.0	-	-	-	-	-
12	Panchkula	33.3	-	66.7	-	-	-	-
13	Srinagar	30.0	40.0	-	10.0	10.0	10.0	-

Source: NPC Field Survey –August-Sept 2012

3.4.5 Price Differential

It has been observed that along with quality, price also plays a very important role and acts as a deciding factor for buying silk mark based products. Majority of the consumers in all the cities visited by NPC team were expressing price of silk mark based products is not important factor for buying silk mark based products. As many as 67% of them expressed the opinion that high price does not discourages them from buying of Silk Mark products.

As many as 70 percent of the consumers have opioned that the prices of silk mark products as compared to silk products without silk mark are higher by only less than 10%. However, only 10 percent of the consumers have expressed price difference of more than 30% in some cases. The high price difference observed by the consumers may be attributed to the fact that the consumers might be comparing the prices of pure silk mark products with the semi-silk products being sold in the name of silk. It can be seen from the **Table 3.19** that a large section of the consumers interacted were apprehensive about price difference of Silk Mark products compared to silk products without Silk Mark but equal number of consumers have opined no difference as well. As a whole, it has been observed that the Silk Mark products

are premium priced as compared to other silk products mainly due to its superior quality and genuineness.

Table 3.19: Price Difference between Silk Mark Products as compared to silk products with no Silk Mark

S.No	Places	Response (%)		
		More Difference	Less Difference	No Difference
1	Bangalore	-		100.0
2	Chennai	100.0		-
3	Coimbatore	100.0		-
4	Palakkad	50.0		50.0
5	Hyderabad	33.3	11.1	
6	Mumbai	-		50.0
7	Kolkata	-	20.0	80.0
8	Guwahati	100.0		-
9	Varanasi	-		100.0
10	Lucknow	50.0		-
11	New Delhi	20.0	80.0	
12	Panchkula	80.0		20.0
13	Srinagar	90.0		10.0

Source: NPC Field Survey –August-Sept 2012

However as far as difficulty in getting Silk Mark Products is concerned, more than 80% of the consumers across all the cities visited by NPC team have expressed the view that they are not facing any difficulty.

3.4.6 Steps required for promoting Silk Mark in India during XII Five Year Plan

Information was sought on various steps required for promoting Silk Mark in India during XII Five Year Plan. Likewise Authorized users, consumers have also expressed the need of awareness of silk mark on large scale basis. Some of the major steps suggested by consumers for promoting Silk Mark in India during XII Five Year Plan are:

- Increasing awareness through banners, advertisement in electronic and print media at state and national level, road shows and display at expo, exhibition etc
- Regular inspection of authorized users of silk mark regarding authenticity of silk mark product
- Need to set up modern technology to produce better fabric
- Reduction in price of silk mark based products as compared to other silk products.
- Rate list should be put for multiple designs.
- Silk mark labeling should be made more attractive.

CHAPTER IV

MAJOR FINDINGS & RECOMMENDATIONS

This chapter summarizes the findings of the evaluation study. The findings are drawn from the discussions with the various stakeholders and also based on detailed interviews with structured questionnaires on the impact of QCS scheme.

In order to assess the impact of the Scheme, field level data was collected through structured questionnaires from SMOIs, cocoon testing centres, raw silk testing centres, authorized users of silk mark, retailers as well consumers of silk. The opinions and suggestions received have also been utilized along with the data collected from the field in drawing the inferences.

As per the detailed discussions carried out with the stakeholders and field level data analysis, major findings are summarized below:

4.1 Findings of the evaluation study

- Promotional activities undertaken by the Silk Mark Organization of India (SMOI) has enhanced the visibility of the pure silk product as well as awareness level regarding silk mark and purity of silk among the traders as well as consumers.
- Large numbers of sales personnel (4512) have been trained on various quality parameters by SMOI during XI Five Year Plan.
- Promotional activities by SMOIs have resulted in the enrollment of a large number of Authorized Users (AUs) over the years. Currently 1999 Authorized Users are enrolled across 13 SMOI chapters in India.
- Information regarding the pure silk outlets among end users has improved over the years.
- Identification of genuine silk product has improved due to quality check mechanism adopted by the SMOI chapters.
- Authorized users of “silk mark” label have got an edge over their competitors in marketing silk products.
- Sales personnel who got training on quality aspects have helped in ensuring quality checks as well as promotion of genuine Silk Mark products.

- Around sixty exhibitions have been organized since the year 2008 by SMOI chapters in association with Authorized Users and these exhibitions have created awareness of silk mark products across the country.
- 24 Cocoon testing centres established during the XI Five Year Plan ensured good prices to Cocoon farmers on the basis of quality grading.
- Cocoon testing centres have helped Cocoon farmers in identifying the problems related to rearing of silk worm.
- Transparency in price fixing has improved the credibility of cocoon markets where CTCs have been established.
- Quality Assurance of cocoons to the reelers due to the intervention of CTCs.
- Establishment of Raw silk testing centres has guaranteed quality yarn for the weavers. The component was dropped during XI Five Year Plan. There is a need to include the component during XII Five Year Plan.
- Price fixing mechanism has ensured right prices for the reelers and twistors wherever raw silk testing centres are functioning.
- Financial support may be provided to Authorized Users to participate in international textile exhibitions.
- Present manpower deployment across SMOI chapters need to be rationalized based on the promotional work targets and achievements.
- Total Number of Authorized users at all India level is only 1999 which is very low considering the size of Indian Silk Market. Vigorous promotional efforts are required to bring in more Authorized Users enrolled under the QCS scheme.
- Though the awareness regarding Silk Mark is increasing, still a lot of efforts are needed to promote the brand among the retailers and consumer level.
- Silk Mark as a symbol of quality is yet to establish its presence in the field. Due to the fact that consumers rely mostly on their personal relation with the retailer for quality of the silk material they are buying and not on the Silk Mark certification. Some of the authorized users have expressed that customers trust their name and words more than the silk mark label.
- Consumer demand for pure silk has declined to some extent owing to the price rise in the recent years. In the domestic market pure silk mainly comprises of sarees and is evenly distributed among heavy, medium and light ranges. It has been noted that

high cost in the recent years are inhibiting the promotion of silk. The main consumers of the silk mark tag are the traders of pure silk sarees. The Authorised Users are concerned that the sarees are sold on the basis of their weave and design. Majority of the consumers are not concerned with the purity of the silk.

- The sales men from the shops of the authorized users are given adequate training and they are given the responsibility of checking the lot and attaching silk mark tag on the articles. It's the sole discretion of the authorized users whether they attach silk mark tag on genuine pure silk article or any other product. Some of the authorized users say that they have reliable suppliers and hence they do not test the article before putting silk mark tags. There is no regular surveillance from the SMOIs, hence, the possibility of tags on spurious products cannot be ruled out.
- Silk Mark only certifies that the product is pure silk, it does not guarantee the percentage composition of the silk. This is being misused by some people as reported by the officials. Retailers mix Tasar with Muga and sell the product by saying it is pure Muga.
- It has been observed that efforts are being taken to establish Silk Mark in the domestic market; however, efforts to increase the visibility of silk mark on international platform are required.
- Cocoon testing centres established in the major cocoon markets have provided opportunity of getting price on the basis of quality grading to the Cocoon farmers. The renditta estimation of the cocoons helps the farmers to know the quality of the cocoons produced by them. This, in turn, helps in bringing quality awareness among the farmers and motivates them to produce required quality of cocoons conforming to the requirement of Reelers. On the similar lines, the raw silk testing centres grade the silk yarn on the basis of various quality parameters and help the producers in getting adequate prices for their produce.

4.2 Recommendations

- Strong measures need to be adopted to ensure the awareness about the Silk Mark. An aggressive campaign through print and e-media may be initiated to publicize the scheme among one and all. Consumer awareness is the key to the success of Silk Mark. In order to achieve this, suitable media plan should be put in place to organise

massive campaign, awareness programmes, road shows, participation on national & international exhibitions etc. Innovative methods and strategies should be created to achieve generic promotion of silk.

- More and more awareness program has to be conducted to enlighten the people about the advantages of using Silk Mark so that a brand image can be created among the users of Silk Mark which is at par with Hallmark or ISI mark. Rather than forcing silk mark from the sellers end, efforts should be made to create the demand from consumers end. The awareness campaign should also be planned in the sub-urban as well as in rural areas so that the coverage could be broadened.
- Promotional activities at international platform should be taken up so that the silk mark could be internationally acclaimed. Funds should be allocated to advertise silk mark in international exhibitions. Financial support may be given to the authorized users of silk mark to participate in international textile exhibitions.
- Suitable policy measures should be adopted to make the prices of pure silk products comparable to its competing products so that the domestic demand for pure silk could be sustained.
- Regular surveillance of the premises of authorized users are required to minimize any kind of possible misuse of silk mark.
- Muga being a costly material and high in demand in Assam, a “MUGAMARK” would be most beneficial which would certify the product of having pure Muga and not blended with any other silk yarn.
- Present manpower deployment across SMOI chapters need to be rationalized based on the promotional work requirement as per the targets.
- Number of Authorised users as on today is only 1999 which are very low considering the size of Indian Silk Market. More vigorous promotional efforts are required.
- Establishment of Raw silk testing centres has guaranteed quality yarn for the weavers. The component was dropped during XI Five Year Plan. There is a need to include the component during XII Five Year Plan.
- Cocoon testing centres may be provided with reeling devises so that the actual renditta can be measured.

It has been found that the QCS scheme immensely contributed towards the dissemination of quality consciousness among the producers, authorized users, retailers and consumers across India. The scheme was also successful in spreading the much needed awareness about the purity of silk. The spread of “Silk Mark” helped to provide the much needed fillip to brand India in the international silk market arena. Therefore, it is recommended that the QCS scheme may be continued with additional financial support during the XII Five Year Plan.

CHAPTER V

FOCUS OF QCS ACTIVITIES DURING XII PLAN PERIOD

5.1. Introduction

One of the main objective of the XII plan is to ensure that India emerge as a leader in the World silk market through continuous efforts in research and development, technology transfer to end users so as to produce competitively priced high quality silk. Considering the globalization of textile trade, removal of trade barriers and the competition in domestic and export fronts, it is imperative for India to initiate suitable measures for instilling quality assurance in the production chain. Quality assessment and quality certification are the main activities for quality assurance.

In India silkworm cocoons are transacted on the subjective assessment without testing and the cocoon price is determined purely based on the visual inspection of the buyer at the time of purchase. Quality of cocoons is very important in deciding the performance during reeling as well as producing quality raw silk. Assessment of quality of cocoons prior to auction facilitates fair trading between farmers and reelers and promotes quality based pricing.

The Cocoon Testing Center & Raw Silk Testing Center components will put in place a quality based pricing system to assure quality at different levels of production process and ensures production of quality cocoons and raw silk, which ultimately leads to production of quality products. This scheme will also bring in quality awareness among the producers to get better returns for their produce, besides ensuring quality assurance to the buyers / consumers and increases the demand for Indian Silk both in domestic and International markets.

The objective of “Silk Mark” Scheme is to create awareness among the consumers about the purity and quality of silk product and instill confidence in them on the quality of product sold with “Silk Mark Label”. The scheme envisages protection of the consumers’ interest so as to ensure that one is able to buy genuine silk product. Another focus area of the scheme is generic promotion of the Indian silk. Any person or company who is a manufacturer, trader, exporter of silk products when he is authorized to use the silk mark label and becomes the member of the scheme she/ he will be trained in testing of silk and relevance and use of the Silk Mark Label. “Silk Mark” would be a symbol of “Purity of Silk” and uphold its sanctity.

Silk Mark products vouch for 100% purity in silk. The Authorized User should have certain facilities and follow quality standards as specified in the set procedure.

5.2. Programmes for XII Plan

Considering the importance of quality up-gradation and to create consciousness among producers, the programme should be implemented in all the States including North East. The following components may be included in the programme:

5.2.1. Establishment of Cocoon Testing Centres

Quality of silk cocoons is determined by a number of characteristics. However, in the absence of a single measure for determining the overall quality, the price of the cocoons is based on one or two characteristics, which are deemed to be most important for the buyer or the seller i.e. Shell Ratio % and Defective Cocoon % .

In order to facilitate cocoon testing in different cocoon markets of the country, it is proposed to establish Cocoon Testing Centres at various cocoon markets. Apart from Departments of Sericulture of different states, these testing facilities may be promoted through NGOs, Quality Service Clubs and Societies for further propagation of quality testing.

5.2.2. Establishment of Raw Silk Testing Centers (RSTCs)- (New Component)

To promote quality awareness among cocoon growers as well as raw silk producers, dissemination of the concept of raw silk testing has been felt imperative taking into consideration the prevailing market situation. Basic objective of testing the raw silk is to promote value based product thereby creating an impetus towards quality improvement of raw silk. It is necessary to institutionalize this concept by introducing raw silk testing centers. Apart from DOS of different states, these testing facilities may be promoted through NGOs, Quality Service Clubs and Societies for further propagation.

The Central Silk Board has established Silk Conditioning and Testing Houses in traditional states where required facilities for silk testing is made available to reelers, weavers, traders to test the quality. These facilities are available at limited places & even the available facilities are not reaching the majority of the entrepreneurs' i.e. raw silk producers and consumers. It is therefore proposed to create testing facilities available at more places both at Govt. and private sectors to create awareness towards quality improvement in silk.

5.2.3. Promotion of “Silk Mark”

Promotion of “Silk Mark” scheme may be implemented through Central Silk Board Certification Centres/Regional Offices etc., located all over the country. Resource mobilization may be through Membership/Authorised Users Fees and sale of Silk Mark Labels.

Following major activities are proposed under the scheme component:

5.2.3.1. Media and publicity

Consumer awareness is the key to the success of Silk Mark. In order to achieve this, suitable media plan should be put in place to organize massive campaign, awareness programmes, road shows, participation on national & international exhibitions etc. Innovative methods and strategies may be created during the plan period to create more awareness about Silk Mark and also in the process achieve generic promotion of silk.

5.2.3.2. Up-gradation of Regional Laboratories

Regional laboratories attached to SMOI chapters at 6 centers are proposed to be upgraded to a level that is commensurate to the regional requirement. This need to be taken up in the 12th Plan period which will cater to the testing needs of the region both domestic, export and import segments. The consumer groups and authorized users of Silk Mark can have access to these labs for quality and purity testing of their products.

5.2.3.3. Mobile Testing Cum Branding Vehicle

Testing cum branding vehicle is an excellent idea in the promotion of Silk Mark. This multifunctional vehicle can be deployed to the market areas facilitating spot testing of the silk products both under Silk Mark or otherwise. This will enhance the consumer confidence in Silk Mark. The same vehicle can be deployed for Road shows to different areas including newer areas to secondary towns. This will ensure deeper penetration of Silk Mark during 12th plan period.

5.2.3.5.Engagement of Professionals (Executives) for SMOI

Silk Mark Organization of India (SMOI) needs a professional direction to enhance the confidence and image of Silk Mark Label on the lines of other similar Marks, which is prevalent today. The Silk Mark Label in course of time should be able to generate sufficient

resources and also ensure that the Label is a symbol of confidence among the consumers. There is a need for SMOI to be manned by experts to run the organization on professional lines. Since the Silk Mark label is a measure to protect the consumer interest on one hand and also sustain itself on its own by generating enough resources there is a need to engage experts on contract basis to run the organization professionally.

5.3. Brand promotion of Indian Silk under Silk Mark

The Indian Silk has tremendous strength in terms of its exclusiveness, cluster based production, varieties in terms of its weave, pattern and cover, the vibrant colours, intricate designs, rich drape and fall. All the properties of Indian silk are difficult to capture and promote in an international market. The Indian silk brand should be able to project the diversity and the richness of the Indian craft and deliver new forms of value to the international consumers. It should be distinct and niche and should enable the international buyers to source the ‘Indian Silk’ from the Indian market. The Indian silk brand promotion for the XII Plan may be strategically put in place with interaction with all the stake-holders, exporters, importers, fashion designers. This can provide tremendous impetus to Indian silk export promotion in international market. This can be in the form of advertisement and market promotion, participation in international shows as ‘Indian Silk Brand’, road shows, etc.

In order to supplement the small weavers/manufactures to participate in the market development activities such as brand promotion, publicity, participation in National/international expo, it is proposed to create a market development fund.

5.4. Impact of the programme

During XII Plan period SMOI expects that more than 164 lakhs of Silk Mark Labels will be reaching the market, which can create immense confidence among silk consumers. About six existing Laboratories may be upgraded in different locations of SMOI by providing additional equipments. All this could help SMOI to become self-sufficient in future. About 2000 awareness programmes, road shows, workshops, training programmes are proposed to be conducted during the 12th plan period which would increase the consumer awareness - key to the success of Silk Mark. To spread the Silk Mark message and for brand promotion of Indian Silk, participation in various International Exhibitions held in India and overseas also may be planned.

Annexure I

SURVEY QUESTIONNAIRE: QUALITY CERTIFICATION SYSTEM (Silk Mark Organization of India)

National Productivity Council, an autonomous organization under Ministry of Commerce & Industry, Government of India, is carrying out a study on “Evaluation of Quality Certification System implemented during XI Plan”, sponsored by Central Silk Board, Ministry of Textiles, Government of India. The objective of this field survey is to find out effectiveness of Quality Certification Systems scheme implementation during XI Plan period. Findings of the study will be utilized by CSB to modify and improve QCS implementation during XII Five Year Plan.

(Please fill as per instructions given with each question.)

Write codes/ values in the box provided at the right hand side)

1.0	General Information																			
1.1	Places: (1= Bangalore, 2= Chennai, 3= Coimbatore, 4= Palakkad, 5= Hyderabad, 6= Mumbai, 7= Kolkata, 8= Guwahati, 9= Varanasi, 10= Lucknow, 11= New Delhi 12= Panchkula, 13= Srinagar)																			
1.2	Name of the Respondent: _____ Designation: _____ Address: _____ _____ _____ Phone/Mobile No.: _____ E-Mail: _____																			
1.3	No. of employees in SMOI																			
	<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 50%;">Designation</th> <th style="width: 20%;">No. of employees</th> <th style="width: 30%;">Remarks</th> </tr> </thead> <tbody> <tr> <td>Director</td> <td></td> <td></td> </tr> <tr> <td>Joint Director</td> <td></td> <td></td> </tr> <tr> <td>Deputy Director</td> <td></td> <td></td> </tr> <tr> <td>Assistant Director</td> <td></td> <td></td> </tr> <tr> <td>Extension Officers/Quality Inspectors</td> <td></td> <td></td> </tr> </tbody> </table>	Designation	No. of employees	Remarks	Director			Joint Director			Deputy Director			Assistant Director			Extension Officers/Quality Inspectors			
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Joint Director																				
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Assistant Director																				
Extension Officers/Quality Inspectors																				
1.4	Type(s) of Quality Certification Provided. Please tick (√) for the applicable ones:																			
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Silk Mark Certificate																				
Any Other certification (Please specify)																				
1.5	Major activities undertaken under Quality Certification System (QCS) scheme during XI Five Year Plan (2007-08 to 2011-12)?																			
2.0	Standard Procedure adopted & Infrastructure available for Certification																			
2.1	Please explain the standard procedure adopted (step wise) for Silk Mark Certification?																			

2.2	Please provide details regarding the tests carried out for Silk Mark Certification and the purpose?																																																								
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3.2	Physical and Financial Achievements of SMOI																																																								
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3.3	Any other specific physical achievement/impact. Please Explain.							
3.4	Activity wise Expenditure of the budgeted amount under QCS scheme (Rs Lakhs)							
	Year	Training	Certification	Publicity through media	Silk Mark Expos	Other Activities	Total	Remarks (for other Activities)
	2007-08							
	2008-09							
	2009-10							
	2010-11							
	2011-12							
	Total							
	Please provide details of Silk Mark Expos and Publicity activities							
3.5	Impact of Silk Mark (1= Increased Exports 2= Increased Domestic Market 3= Better Quality of Silk 4= Increased Turnover 5= Any other)							
3.6	Percentage of silk producers/weavers who are getting their products certified from Silk Mark to the total no. of silk producers/weavers? (1= 1-25% 2= 26-50% 3=51-75% 4= 76% and above)							
3.7	Approximate percentage range of end consumers who are aware of Silk Mark? (1= 1-25% 2= 26-50% 3=51-75% 4= 76% and above)							
3.8	What are the steps taken for promoting silk mark in India?							
3.9	What are the areas of possible improvements in the QCS scheme During XII Five Year Plan?							
3.1	Initiatives Planned for the XII Five year Plan							
0	Sr. No.	Name of the Initiative	Objectives/Targeted stake holders	Provisional Fund Requirements				

(If the space provided is insufficient, kindly use additional sheets)

Thank you

Annexure II

SURVEY QUESTIONNAIRE: QUALITY CERTIFICATION SYSTEM (Authorized Users of Silk Mark)

National Productivity Council, an autonomous organization under Ministry of Commerce & Industry, Government of India, is carrying out a study on “Evaluation of Quality Certification System (QCS) implemented during XI Plan”, sponsored by Central Silk Board, Ministry of Textiles, Government of India. The objective of this field survey is to find out effectiveness of Quality Certification Systems scheme implementation during XI Plan period. Findings of the study will be utilized by CSB to modify and improve QCS implementation during XII Five Year Plan.

(Please fill as per instructions given with each question.)

Write codes/ values in the box provided at the right hand side)

1	Places: (1= Bangalore, 2= Chennai, 3= Coimbatore, 4= Palakkad, 5= Hyderabad, 6= Mumbai, 7= Kolkata, 8= Guwahati, 9= Varanasi, 10= Lucknow, 11= New Delhi 12= Panchkula, 13= Srinagar)																															
2	Name of the Authorized User: Address: _____ Phone/Mobile No.: _____ E-Mail: _____																															
3	Year in which the first time the Silk Mark was obtained?																															
4	Percentage of your silk output certified as Silk Mark as compared to total silk output. (1= 1-25% 2= 26-50% 3=51-75% 4= 76% and above)																															
5	Whether the demand for your products increased after getting Silk Mark Certification? (1= Yes 2= No)																															
5.1	If yes, to what extent the demand increased (percentage range) (1= 1-25% 2= 26-50% 3=51-75% 4= 76% and above)																															
5.2	If no, what are the reasons for no increase in demand																															
6	Market Coverage																															
	<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 15%;">Year</th> <th style="width: 20%;">Exports (Rs Lakhs)</th> <th style="width: 20%;">Imports (Rs Lakhs)</th> <th style="width: 20%;">Domestic Sales (Rs Lakhs)</th> <th style="width: 25%;">Customers (Approximate number)</th> </tr> </thead> <tbody> <tr> <td style="text-align: center;">2007-08</td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td style="text-align: center;">2008-09</td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td style="text-align: center;">2009-10</td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td style="text-align: center;">2010-11</td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td style="text-align: center;">2011-12</td> <td></td> <td></td> <td></td> <td></td> </tr> </tbody> </table>	Year	Exports (Rs Lakhs)	Imports (Rs Lakhs)	Domestic Sales (Rs Lakhs)	Customers (Approximate number)	2007-08					2008-09					2009-10					2010-11					2011-12					
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7	Have you faced any difficulty in obtaining Silk Mark? (1= Yes 2=No)																															
7.1	If yes, Please explain																															
8	Are you aware of the type of quality checks required for obtaining Silk Mark? (1= Yes 2= No)																															
9	Whether the silk Mark improved the quality of your products? (1= Yes 2=No)																															
10	Impact of Silk Mark on your silk related activities (1= Increased Exports 2= Increased Domestic Market 3= Better Quality of Silk, 4= Increased Turnover 5= Any other)																															
11	Approximate percentage of customers who are looking for Silk Mark products? (1= 1-25% 2= 26-50% 3=51-75% 4= 76% and above.)																															

12	What are the other steps that can be taken up for promoting Silk Mark in India?
13	What are the possible areas where improvements are required in the certification process during XII Five Year Plan?

(If the space provided is insufficient, kindly use additional sheets)

Thank you

Name of the Official/Investigator : _____

Signature : _____

Place of Survey : _____ Date: _____

Annexure III

SURVEY QUESTIONNAIRE: QUALITY CERTIFICATION SYSTEM (Retailers/Consumers of Silk Products)

National Productivity Council, an autonomous organization under Ministry of Commerce & Industry, Government of India, is carrying out a study on “Evaluation of Quality Certification System implemented during XI Plan”, sponsored by Central Silk Board, Ministry of Textiles, Government of India. The objective of this field survey is to find out effectiveness of Quality Certification Systems scheme implementation during XI Plan period. Findings of the study will be utilized by CSB to modify and improve QCS implementation during XII Five Year Plan.

(Please fill as per instructions given with each question.)

Write codes/ values in the box provided at the right hand side)

1	Places: (1= Bangalore, 2= Chennai, 3= Coimbatore, 4= Palakkad, 5= Hyderabad, 6= Mumbai, 7= Kolkata, 8= Guwahati, 9= Varanasi, 10= Lucknow, 11= New Delhi 12= Panchkula, 13= Srinagar)	
2	Name of the Silk Retailer/Consumer: Address: _____ Phone/Mobile No.: _____ E-Mail: _____	
3	Do you sell/purchase Silk Mark based products? (1= Yes 2= No)	
3.1	If no, reasons	
4	Year in which for the first time Silk Mark certified product was sold/bought?	
5	How do you know about Silk Mark? (1= Newspaper 2= Television 3= Colleagues/Partners 4= Internet/website 5= SMOI/Govt. Officials 6= Customers 7= Magazine 8= Any other source (Please specify)	
6	Percentage of sales of products having Silk Mark to total sales? (1= 1-25% 2= 26-50% 3=51-75% 4= 76% and above)	
6.1	Do you always buy Silk Mark based products? (1= Yes 2= No)	
6.2	Ratio of Silk Mark products to total Silk products purchased? (1= 1-25% 2= 26-50% 3=51-75% 4= 76% and above)	
7	Do you find the Silk Mark products better than the silk products without Silk Mark? (1= Yes 2= No)	
8	In what aspects products having Silk Mark are better? (1= Better quality 2= Better fabric 3= Durability 4= Comfort 5= more Eco friendly, 6= Better Marketability (demand) 7= Others (Please specify)	
9	Please explain the kind of difference in quality of products with Silk Mark and products with no Silk Mark?	
10	Price difference between Silk Mark products as compared to silk products with no Silk Mark? (1= More 2= Less 3= No difference)	
10.1	Range of price difference between silk mark products as compared to silk products without silk mark. (1= less than 5% 2= 6-10% 3= 11-20% 4= 21-30% 5= 31-40%, 6= 41-50% 7= More than 50%)	
10.2	Does the high price discourage the market/buying of Silk Mark products? (1 = Yes 2 = No)	

11	Do you find any difficulty in getting Silk Mark Products? (1= Yes 2=No)	
12	Indicate the difficulty in getting Silk Mark Products? (1= Non availability 2= Untimely delivery 3= Excessive follow up from manufacturers/traders 4= Unreasonable prices 5= Any Other (Please explain))	
13	Impact of Silk Mark from your personal experience (1= Increased Sales/ Market 2= Better Quality of Silk 3= Any other)	
14	Approximate percentage range of end users who are aware of Silk Mark? (1= 1-25% 2= 26-50% 3=51-75% 4= 76% and above)	
15	What are the steps that can be taken up for promoting Silk Mark in India during XII Five Year Plan?	

(If the space provided is insufficient, kindly use additional sheets)

Thank you

Name of the Official/Investigator : _____

Signature : _____

Place of Survey : _____ Date: _____

Annexure IV

SURVEY QUESTIONNAIRE: QUALITY CERTIFICATION SYSTEM (COCOON TESTING/SILK CONDITIONING & TESTING HOUSES/RAW SILK TESTING CENTRES)

National Productivity Council, an autonomous organization under Ministry of Commerce & Industry, Government of India, is carrying out a study on “Evaluation of Quality Certification System implemented during XI Plan”, sponsored by Central Silk Board, Ministry of Textiles, Government of India. The objective of this field survey is to find out effectiveness of Quality Certification Systems scheme implementation during XI Plan period. Findings of the study will be utilized by CSB to modify and improve QCS implementation during XII Five Year Plan.

(Please fill as per instructions given with each question.)

Write codes/ values in the box provided at the right hand side)

1.0	General Information	
1.1	Places: (1=Andhra Pradesh, 2=Jammu & Kashmir, 3=Karnataka, 4=Tamil Nadu, 5=West Bengal, , 6=Assam, 7=Chhattisgarh, 8=Himachal Pradesh, 9=Jharkhand, 10=Maharashtra, 11=Manipur, 12=Meghalaya 13=Uttar Pradesh, 14=Uttarakhand)	
1.2	Name of the cluster in which it is located	
1.3	Testing Center (1= Cocoon Testing Center 2= Raw Silk testing Center 3= Any other (Plz. specify)	
1.4	Owned & Established by (1= DOS 2= CSB 3= Any other	
1.5	Name of the Silk Mark Organisation of India you are linked to	
1.6	Name of the Respondent: _____ Designation: _____ Address: _____ _____ _____ Phone/Mobile No.: _____ E-Mail: _____	
1.7	Has the center received assistance under Quality Certification system scheme of CSB? (1= Yes 2= No)	
1.8	If yes what is the assistance received (Rs Lakhs)	
1.9	No. of employees	
	Designation	No. of employees
	Director	
	Joint Director	
	Deputy Director	
	Assistant Director	
	Extension Officers/Quality Inspectors	
	Any other	
2.0	Standard Procedure adopted & Infrastructure available for Testing	
2.1	Please explain the standard procedure adopted (step wise) for testing quality of Cocoon/Raw Silk?	
2.2	Please provide details regarding the tests carried out for Cocoon/Raw Silk yarn testing?	
	Name of the test	Purpose
2.3	Whether these tests undertaken are adequate? (1= Yes 2= No)	
2.3.1	If no, Please explain	

2.4	Whether the testing equipments are of latest technology? (1= Yes 2= No)		
2.5	Whether the infrastructure for the testing is adequate? (1= Yes 2= No)		
2.5.1	If no, Please explain		
2.6	Is the manpower available is sufficient? (1= Yes 2= No)		
2.6.1	If no, Please explain		
2.7	Whether the skilled manpower for testing is available? (1= Yes 2= No)		
2.7.1	If no, Please explain		
3.3	Whether the infrastructure enough to cater to the testing requirements of the cluster/district/ state (1= Yes 2= No)		
3.3.1	If no what are the infrastructural gaps and how it can be filled?		
3.8	What are the steps that may be taken for promoting silk mark in India?		
3.9	What are the areas of possible improvements in the QCS scheme during XII Five Year Plan?		
3.10	Initiatives Planned for the XII Five year Plan		
	Sr. No.	Name of the Initiative	Objectives/Targetted stake holders

(If the space provided is insufficient, kindly use additional sheets)

Thank you

Name of the Official/Investigator : _____

Signature : _____

Place of Survey : _____ Date: _____

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Team Leader	Dr.K.P.Sunny Group Head (ES & SS)
Study Team	Shri Rajesh Sund Deputy Director (ES)
	Dr. Rajat Sharma Deputy Director (ES)
	Shri Deepak Gupta Assistant Director (ES)
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	Shri Rohit
	Shri Anil Kumar
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	Shri Siddhartha Bose
	Shri Mahabir Prasad Mandiwal