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Emerging Issues and Concerns of Silk Carpets Industry in Kashmir

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Abstract

Indian handmade carpets are dominant in the global market with the highest share. The varieties in handmade carpets give Indian carpets a competitive edge. Carpets made from wool, cotton, staple, silk and other varieties have prominence in it. Silk carpets of Kashmir are at the zenith due to their unmatched quality, intricacy, the density of knots and quality handwork. Due to heavy machine interference and sale of forfeited products, silk carpets have taken to shelves with a shrinking customer base and limited producers who are even going down every day. The share of silk carpets is minimal in total carpet exports. This paper is a representation of the major issues and concerns faced by the Kashmiri Carpet Industry and their possible way out. Due to its sustainable enterprise characteristics, it is environment-friendly and provides employment to thousands of artisans across the valley. This is a projected study which is only limited to the conceptual and theoretical aspects of the declining silk carpet industry in Jammu and Kashmir.

Keywords: Emerging Market Trends, Global Market, Handicrafts, Kashmir, Silk Carpets

1. Introduction

The carpet industry is a part of handloom sector in India, (Handloom Census of India 2009-10). Providing livelihood to 3 million rural and semi-urban artisans (Gito and Kumar, 2014). Indian handmade carpet industry is essentially a cottage industry (Sinha, S. 1982). Indian carpet industry has flourished as an export good and its labour intensive nature with beautiful and magnificent handwork (Liebl and Roy, 2003) placed it prominently in the international handloom map. India has emerged as the largest exporter of handmade carpets in volume and third in value terms beating Iran and China (Srivastava, *et al*, 2007).

Handmade and hand knotted carpets are manufactured in the northern belt of India and its 70 percent export share comes from Badhoi carpet belt (Venkateshwarlu, D. *et al*, 2006). The associated manpower includes spinners, dyers, designers and helpers and it creates indirect employment as well as livelihood to tradesmen, manufacturers and exporters in the country (Satya 2009). Among the hand knotted carpets silk carpets of Kashmir are the most revered and most acclaimed due to their beautiful designs, the density of knots and quality. The most noticeable people associated with the expansion of handicrafts of Kashmir are Mir Syed Ali Hamadani^(RA) a Sufi saint and reformer who brought Islam to Kashmir, and that of Sultan Zain-ul-Abidin, widely known as Bud Shah by Kashmiris (Savasere, R. 2010).

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Jammu and Kashmir State economy derives its 40 per cent export value of handicrafts from carpets. It is a pure labour based and engages approximately 4-5 lakh artisans (Economic Survey of J&K, 2013-14). During the past decade, the appeal of its exclusivity and mystical value has somehow faded and is struggling with problems like absence of brand image and quality degradation due to artificial silk and a multifaceted assault from counterfeit products within and outside the state (Sakib and Sultan, 2013).

2. Objectives

1. To understand the scenario of Indian and Kashmiri Carpet industry.
2. To identify major issues haunting handmade carpet industry of Kashmir.
3. To estimate the possibilities of Skill up gradation and Sustainable Enterprise Development.

3. A Brief Analysis of Handmade (Carpets) in India

Indian carpet industry is rapidly increasing its share of the European and American market by producing handmade carpets as cheap as machine made due to huge labour advantage. With new adaptations and ability to adjust to change (Bilgin *et al*, 2011), India has achieved the highest share of 35 percent in total Global imports of handmade carpets (CEPC newsletter 2016). Majorly there are seven types of carpets being produced in the northern belt of India, hand-knotted woollen carpets, tufted woollen carpets, gabbe, woollen carpets, hand-made woollen dhurries, pure silk carpets, staple/synthetic carpets, chain stitch rugs (CEPC website).

The data published in the newsletter magazine of carpet export promotion Council (CEPC 2016), shows that in 2011-12 the total export achievement of handmade carpets and other floor coverings was 4583 crores, 7110 crores in 2013-14 and in 2015-16 it has heightened to 9482 crores while it was targeted at 10000 crores. The share of India has constantly increased and especially in the handmade carpet segment.

Table: 1 Targets and Achievements: Exports of Handmade Carpets and Other Floor Coverings

Year	Target in US \$ (Million)	Achievement US\$ (Million)	Growth in Percentage	Target in Crores	Achievement in Crores	Growth in Percentage
2011-12	800.00	955.68	*	3800.00	4583.08	*
2012-13	960.00	1080.90	13.10%	5200.00	5877.30	28.24%
2013-14	1146.00	1175.24	8.73%	6500.00	7110.42	20.98%
2014-15	1260.00	1380.67	17.48%	7500.00	8441.95	18.73%
2015-16	1591.00	1448.24	4.89%	10000.00	9481.36	12.31%

Source: (CEPC) Magazine newsletter (June 2016)

The data from the ministry of commerce and textiles (2016) points that overall textile and allied products increased during Apr-Mar period of 2014-15 but decreased during Apr-Mar 2015-16. The handloom products have been stable for the consecutive three years with negative growth of exports during Apr-Oct 2011. The carpets excluding handmade carpets have been increasingly in demand and has a positive export growth of 2.64 during Apr-Oct 2016. Coming to the segment of silk carpets, it is widely failing to retain its space and its declining trend in both imports and exports is an issue of concern. There is a high negative growth of exports in silk carpets by - 21.14 percent during Apr-Oct 2016 and has not performed well in imports also. Silk Carpets being challenged by the competition from both internal and external forces. The surge in demand

for cheap and reliable lead to the growth of machine made carpets (Bano, 2015). Analysts consider 2007-08 economic slowdowns as the major cause of the decrease in demand for the pure silk and silk carpets (Gite and Roy, 2014).

Table 2: Comparison of International Data of Import Export Textiles and Handmade Carpet

Handloom (Exports)	Apr-Mar 2014	Apr-Mar 2015	Apr-Mar 2016	Apr-Oct 2015	Apr-Oct 2016(P)	Percentage Growth	Share
Textile & Allied	36,967.57	37,140.74	35,952.65	20,640.1	19,593.95	-5.07	12.61
Handloom Product	373.01	369.56	368.52	226.99	210.6	-7.22	0.14
Carpet (excluding silk handmade)	1,175.73	1,358.17	1,437.60	836.11	858.15	2.64	0.55
Silk carpet	2.57	2.62	2.6	2.16	1.7	-21.14	*
Import							
Textiles & allied	4,835.93	5,512.44	5,332.57	3,284.61	3,485.83	6.13	1.67
Handloom Product	18.83	10.2	10.43	7.99	2.81	-64.84	0
Carpet (excluding silk handmade)	61.33	74.42	79.35	43.25	40.8	-5.66	0.02
Silk carpet	0.1	0.07	0.01	0.07	*	*	*

Source: Ministry of Commerce and textiles, annual report (2015)

4. Issues and Concerns in Carpet Industry

Having drafted the general overview of the Kashmir silk carpet industry. It is inevitable to say that there are many problems faced by Artisans, Manufacturers, and Retailers of this art. Some of the major problems are quoted below.

- i. **The cost of production:** High cost of production has been the reason for the unmatched quality but due to the change of preference and availability of substitutes it is greatly being affected. The introduction of different low-cost ways of production has led to an overall decrease in the demand of silk carpet (Gruen and Coutis 2012).
- ii. **Lack of market awareness and multi-tier system:** Manufacturers and artisans depend upon the middlemen for sale of their carpets as there is general information asymmetry of the market and they end up selling the carpet on the prices offered by the middlemen as their access is restrained by many ground realities. Carpet manufacturing has become a multitier system in which many people earn their part at different stages which increases costs (Market linkage mechanism report¹).
- iii. **Lack of Innovation:** Manufacturers and exporters could not bring major innovations in the fields of manufacturing, designs, marketing and supply chain. The Lack of these innovations is an important reason for the deprivation of this art in the global figures (Bano, 2015).
- iv. **Lack of information:** There are different stages till carpet reaches a customer and every stage has its own limitations or knowledge constraints. While starting from artisans to manufacturers, carpets reach to the middleman and finally end-up in showrooms and export markets. These multi-tier market interventions are very serious issues in the industry (Joy and Kani, 2013).
- v. **The inadequacy of the concrete data:** There is a lack of sufficient data for comparison and analysis of the real-time situation of labour involved and the current growth scenario as well as the quantity sold of the Kashmir silk carpet in the local as well as international market.

4.1 First-Hand Experience of Carpet Industry

Zero percent machine intervention and no compromise in quality are the basic requirements which make silk carpets a premium product. It was clear that lack of basic knowledge about the costing, pricing and demand handling of the product leads artisans to remain unattached with the end benefits. Suggestions like Common Facility Centre (CFC) to be launched in every taluka for the promotion of carpets. CFCs can work in different phases from the loom setting up to the completion of carpet. There are more than 1000 registered card holding carpet weavers in Bandipora district alone, but these registrations will only help if the CFCs are established at desired places to help out these artisans.

The fluctuations in prices are directly responsible for its slow decline. There is a need to understand the emerging market trends and channelize the overall process involved in the manufacturing as well as the distribution of carpets (*Interaction with officials*). Frequent economic slowdown, machine made carpets, wars and flips in the world trade regulation have all added to its fall. It is also evident that tastes of people are changing which has directly impacted its growth. There are problems from the manufacturing point of view also like, the prices of raw material have consistently increased and due to variety, it becomes difficult to quantify quality. Artisans need advance payments so they can continue their living and work but now mostly it turns to be a seasonal work and artisans make it a source of credit from the first manufacturer. It delays the manufacturing time affecting the overall carpet quality. During manufacturing, the rates fluctuate and if they go higher it will benefit either if they slow down artisans cannot compensate because they are already getting a *lowest share*. (*Anonymous interviews to middleman and manufacturers*).

5. The Road Ahead

Based on the facts and figures, the Kashmiri carpets have faced a steep downfall in the national and international market. However, the emerging market trends can now be considered as the opportunity for the industry. The training, creativity, technology, innovation can bring fruitful results to the sector. Detailed as below:

- **Skill Up-gradation:** High competition at Global market demand shows the need of skilled artisan who can fulfil the requirements of the carpet manufacturing based on technology embedded modern designs. Here, Carpet industry has been suffering due to lack of skilled artisans which directly reflect the performance of artisans. It is observed that orders are getting cancelled by the buyers due to such delay in manufacturing and are unable to meet out the orders in time (Pandey, 2015). Seeking to upgrade and purify the skills of the artisans, Government of India launched various programs and schemes for skill and training in traditional art and crafts including 'USTAD' (Ministry of Minority Affairs, September 2015), Carpet Export Promotion Council (CEPC) activities include identification of potential markets, organizing fairs & exhibition of Indian carpets in India & across the globe (Jahan and Mohan, 2015). CEPC's 'Skill Development Training Programmes' is aimed to Train 5000 Artisans in Mirzapur-Bhadoli Carpet Cluster (CEPC web source report, 2017) and "National Handicraft Development Programme by the ministry of textiles, government of India (HDP (final) Annex-III , January 2016). Moreover, Indian Institute of Carpet Technology (IICT) Srinagar under its Human Resource Development (HRD) has been offering many short-term as well as long-term training programmes (IICT website).
- **Market Development (Backward and Forward Linkage):** Due to limited resources availability, the artisans cannot purchase raw-material in bulk. Which leads to high price for low quality materials (Pandey, 2015; Joy and Khani, 2013). By linking backward and forward integration

the carpet industry would be able to regulate the purchase of raw-material, overall cost of manufacturing, personnel finance management, as well as would control the direct distribution or a supply of the finished carpets in the market.

- **Developing Enterprising Behaviour:** Joy and Khani, *et al* 2013 show difficulties for the Cottage and small scale industries due to lack of management and organisation training. Whereas the large scale industries are managed and organised by the field experts. The University of Durham's Foundation for Small and Medium Enterprise Development (FSMED) identifies "enterprising" as such skills of decision-making, persuasiveness, negotiating, planning, and problem-solving (Otuya *et al.*, 2013). This approach to enterprise education can be helpful many ways as it develops enterprise behaviour in varied kind of age groups and areas of life as well as it help young people to work more effectively in the labour market and finally it helps them to setup their own business enterprises.
- **Sophistication in the Product:** Kashmiri Silk carpet is very famous for its unmatched quality and traditional designs. It shows the artistic involvement of the manufacturers. (Bano, 2015). Moreover, most of the artisans are not aware of the market demand and are not able to differentiate their premium product segment. The consumer wants to purchase Kashmiri carpet but due to high price, they move to low prize segment (Dar and parrey, 2013). Manufacturers have to create different price packages to the different segment of customers and based on that the quality of the silk carpet will vary. For better product and cost optimisation artisans may use superiority in the product segment based on price.
- **Evolving Distribution Network:** There is a need to create a structured distribution network in order to develop and grow the exports in silk carpet. There has been a longing dearth of market research for Kashmir handicrafts as indicated by (Manzoor, 1991). The study also reflects that this problem has been more severe in Crewel, Namda, Papier Mache and Wood carving for which market could have been explored globally (Bhat, 2013).
- **Formation of Producers' Group Company:** It is the fourth kind of company recently recognised under the company act amendments act 2002-03. Like producers company involves real producers of agriculture or manufacturing sector. There are more than 3 lakh artisans, involved in Kashmiri carpet manufacturing industry (J&K development report, 2014). There is a big ratio of difference between manufacturers and artisans. Manufacturers can collectively create these producers companies. These companies will have rights to decide rates of the carpets which will be beneficial for all artisans¹.
- **Developing Business Development Centre under Cooperative Model:** The Jammu and Kashmir state has remained industrially backward due to multiple reason like remoteness and poor connectivity, hilly and often inhospitable terrain, shallow markets while handicrafts played a vital role in the progress of this state from centuries (Shah, 2016). Small Business Development Centres (SBDCs) are mostly organizations between government and colleges/universities which are administered by the Small Business Administration. The prime concern is to give educational services to small business owners and aspiring entrepreneurs. SBDCs help to create local and regional economic development through creation of jobs. SBDCs also provide free training services to help small business to grow by providing training and support through organization for marketing, technical problems and other feasibility studies (GCAP Website).
- **Use of Technology:** Technology can benefit Kashmiri carpet industry in several ways. There are various software solutions like Computer Aided Design (CAD) which are being used by some companies for carpet designing to make this art easier, interesting and reliable to the changing society, it is an amazing way to bring down initial cost (Ismail *et al.*, 2011). In

marketing activities, technology can be evolved through Information and Communication Technology (ICT) and E-Commerce. ICT, to boost the performance of SMEs has long been appreciated (Morgan et al., 2006). E-commerce itself may facilitate the exchange of information, products, and payments (Bashar, Z., 2011).

6. Selected Review on Handmade Carpet Products

The available literature on the Carpet Industry and Indigenous handmade carpet industry was explored to understand the status globally. A brief of literature survey is presented below:

Author	Year	Title	Methodology	Objective	Results
Bilgin <i>et al.</i>	2010	The Turkish handmade carpet industry: an analysis in comparison with selected Asian countries	Analysed data Data between 1990 to 2008 for turkey and the comparative advantage	To analyse the Turkish handmade carpet industry and to compare it with selected Far East Countries	Turkish carpet industry is in a recession due to many reason and new countries like Iran, India and China are flourishing in the carpet industry with high production due to cheap labour
Liebl. M, and Roy, T.	2004	Handmade in India: Preliminary Analysis of Crafts Producers and Crafts Production	Qualitative research, Secondary data on income, employment & output of handicraft industry	To assess the craft production & marketing in India & examine the problems of the sector for its slow growth and discuss interventions	Despite export success the domestic market has not done well as the traditional consumption needs has shifted to modern needs. Some interventions like raw material resource renewal, development of brand image can help.
Jahan, M. and Mohan.	2015	Handicrafts in India: Special Reference to Hand Made Carpets	Literature review of journals reports magazines and government reports	To give an overview of Handicraft & Indian handmade carpet as subset of Handicraft	The handicrafts including handmade carpets has an immense potential to lead rural economy. Better infrastructure and government interventions can bring more productivity.
Dar, M. and Paray, A.	2013	Socio-Economic Potential of Handicraft Industry In Jammu And Kashmir	Secondary data from journals reports and review literature of other web sources	Socioeconomic analysis of J&K handicrafts, the challenges and opportunities in the sector and suggestions to promote it.	The paper depicts unique position of J&K handicrafts in improving social and economic conditions of Jammu & Kashmir. It is the preferred sector after agriculture because of suitable topography of state
Joy, M. and Kani, M.	2013	Emerging Opportunities and Challenges for Cottage Industries in India	Literature review of journals' reports, news articles, magazines and other government reports	Evaluate opportunities and challenges for Cottage Industries in India	There is a need for support from the community to prevent exploitation and further develop these industries. In the over-populated countries like ours, the only way to fight unemployment is the development of cottage and small scale industries

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Khan, W. A., and Misra, S.	2012	Impact of Economic Slowdown on Carpet Business in India with special reference to Bhadohi, UP	Review from secondary data obtained from previous surveys, reports, journals, articles	To review, various research findings on the contributions made by handicraft sector in economic development.	Traditional markets are saturated while new market is having opportunities for growth through the adaptation of the changes. The re-engineering measures through government interventions may be helpful in the efficient growth of this Industry.
Bashar, Z. <i>et al.</i>	2011	Stimulating the Growth Trajectory of Carpet through Technological Intervention	Collection of secondary data, Case Study Method, PESTEL Analysis	This paper is an attempt to explore capability of transformation to be brought about in the carpet industry through case study method.	Organized technological up gradation of the business processes is required. Majorly organizations in this sector lacks on inventory (raw material, work in process and finished goods).
Bano, R.	2015	Growth Performance And Global Perspective Of Indian Hand Knotted Carpet	Based on secondary data collected through the reports from various organization and magazines.	Analyse the growth performance of carpet industry Assess the global prospects of Indian carpet industry.	Indian handmade carpet sector is 100% export oriented and providing direct employment to the millions, At present, carpet sector is contributing US\$ 932 million from export to the government exchequer.
Srivastava, <i>et al</i>	2007	Handmade Carpets: The Potential for Socio-economic Growth	(SWOT) Analysis: analysis of the industry through a systematic survey	To analyse the socio- economic potential of Handmade carpets.	Results reveals potential for capacity building in the India, the role of women could be one major factor for industry expansion in socio-economic terms.
Mohi Ud Din, T.	2014	Handicraft Production and Employment in Indian: an Economic Analysis	This research paper is based on the secondary data.	Estimate the production of different handicraft goods in our economy, Understand the role of handicraft sector in generating employment	The paper justifies that there are about 3500 handicraft items produced and the sector employs 60 lacs artisans working independently or in small co-operatives. People are engaged with different crafts like stone, wood, leather, metal, fiber etc. in India
Giri, A. K, and Singh, S. P,	2016	Labourstandards in global value chains in India: The case of hand knotted carpet manufacturing cluster	The empirical study (2012 - 2014), carpet cluster of Eastern UP, Interview method for data collection	Effectiveness of social labours in improving labour standards in the hand knotted carpet manufacturing cluster.	The study reveals that the implementation of codes of labour practices has hardly made perceptible impact on improving labour standards in the clusters. Freedom of association and collective bargaining are absent.

Luqmani, A., Leach, M., and Jesson, D.	2016	Factors behind sustainable business innovation: Case of a global carpet manufacturing company	Case study Method- Interview of co-team members of a company	Paper supports prior work by developing a definition of sustainability oriented innovation and by discussing reflection in practice.	Paper presents an account of sustainability-oriented innovation at Interface, a global manufacturing company . study found that several factors contributed to success adopting an existing route to market, and learning from mistakes.
Aghdai e, S. F. A., and Zardeini, H.	2012	A SWOT Analysis of Persian Handmade Carpet Exports	SWOT Analysis with available empirical and library studies	Analyse the export of Persian handmade Carpet by using the SWOT matrix	Initial empirical, library studies indicate 7 opportunities, 6 threats, 6 strengths & 7 weaknesses in Iran's Carpet Industries.
Shah, R.	2016	An Assessment of Handicraft Sector of J&K with Reference to Central Kashmir	Review of secondary data	Study the growth, Strategies and problems faced by handicrafts sector, Study the role of government in promoting the handicrafts via schemes in state.	Labour intensiveness makes it suitable for the state and creates employment. The overall scenario depicts handicraft products of the state are indeed a pride, which state has been able to maintain, especially in terms of export.
Bhat, F. A., and Yasmin, E.	Jul-13	An Evaluation of Handicraft Sector of J&K – A Case study of District Budgam	This study is descriptive, and analysis of data 100 randomly selected weavers	Evaluate the performance of handicraft during last two decades of turmoil (1990-2010) Problems faced and suggestion.	The handicraft sector is important in the economic structure of J&K state. The problems faced by handicrafts unit holders are that of infrastructure, raw material, power shortage & turmoil.
Saqib, N. and Sultan, A.	2013	An Overview of Geographical Indication in Jammu & Kashmir	secondary data Review for investigating the status of geographical indication in the state and its prospects	The present paper aims at investigating the status of the geographical indication in the state and its prospects.	The J&K government needs to establish policies and mechanisms to identify products with potential for protection through Geographical Indication to raise awareness and to offer financial support.
Pandey . S, K.	2015	Emerging Opportunities and Challenges in Indian Carpet	The research used facts and data available through secondary	Opportunities and Challenges in Indian Carpet Industry	Use of traditional techniques leads to escalation of the price of the product. There are great opportunities in this industry.

7. Conclusion and Research Plan

In order to explore the possibilities of a new business model for the growth of Kashmiri silk carpets, there is a need to conduct a primary research. The research would include the data collection through questionnaires, interviews and general interaction with the government officials involved in the industry, manufacturers, artisans, middlemen, exporters, retailers and local community. This extensive research would help in filling gap existing between the available data and real time problems. The primary research would also help in bringing out the recommendations for a new and sustainable business model. Based on first-hand experience of the industry and its stakeholders, it can be concluded that, though the industry has potential to demonstrate but the obstacles such as, i) High cost of production due to lack of understanding on business skills; ii) Lack of awareness of market and branding mechanism; iii) Low or no innovations; iv) No industry data to analyse and forecast; and v) In-efficient supply chain network hindering the growth.

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