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RESEARCH ARTICLE

OBSTACLES FACED BY CRAFTSMEN AND TRADERS IN PASHMINA SECTOR: A STUDY OF J&K.

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The pashmina industry of Kashmir is a crucial economic contributor to the state and to the country as well. It is one of the largest economic activities providing direct employment to majority of artisans and traders. This sector also plays an important role in the development and welfare of artisans. The pashmina sector makes conspicuous contribution in sustaining export trade of the state. However, the industry has seen a decline during late 90's. The industry is facing lot of challenges due to intervention of modern machinery, lack of information regarding market trends and also due to increased competition from various countries. The industry requires feasible steps to be taken for the purpose of increasing the productivity, competitiveness and capacity of enterprises. This study seeks to identify the major obstacles faced by artisans and traders who are related with this trade. The study also focused on feasible steps to be taken for overall sustainable growth of the cluster.

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Introduction:-

Kashmiri Pashmina refers to type of fine cashmere wool and the textiles made from it. It took centuries of experimentation and refinement to raise this traditional practice of shawl making from a necessity to a unique textile art. Kashmir is the only place in the world where fine embroidered pashmina shawls are being woven. Despite upheavals, the art of making the pashmina shawls in Kashmir is unique and is still practiced in traditional way by local artisans. Pashmina shawls are made of wool which comes from a soft, downy undercoat that grows primarily on the neck and belly of the rare Central Asian mountain goat known as **changthangi goat or Capra-Hircus**. 'Changthangi' goats are found about 14,000 ft where high speed winds and freezing temperature exists. The wool being referred to as 'pashm', which means 'wool' in Persian, hence the shawls are known as pashmina shawls. Pashm has a special luster due to its long fine fibers, which are as thin as 14-16 microns which makes the pashmina shawls exceptionally light, soft and warm and adds to the glamour of a person wearing it. The natural colors of the fleece include white, grey, red, brown and black.

Characteristics and Uniqueness:-

The most unique characteristics of the pashmina shawls with which they are known are as follows:

- a. The fineness of the pashm- wool is between 14-16 microns in contrast to the fines sheep's wool which is 23 microns and of human hair which is up to 200 microns. Thus making the pashmina shawls exceptionally light, soft, and warm.
- b. The pure pashm wool is also fine and delicate that is can only be hand spun and hand woven into fabric, as it keeps breaking during the entire process.
- c. The traditional methods involved in process of making pashmina from more than 2000 years has helped in retaining its unique soft character of pashm wool and given to the world of craft the most exquisite pashmina products.

- d. The basic pashmina shawl from Kashmir is woven colored yardage of 28'', 39'' to 54'' widths which is subsequently made into shawls and other accessories.
- e. The process of making pashmina shawl involves 8 different stages and each stage is completed manually as the fiber keeps breaking through the whole process which cannot be tied except by physical hand. Therefore the fabric is the result of complete hand spinning and weaving.
- f. Pashmina shawl is a result of highly specialized chain production making it superior not only due to its fineness of fibers but also meticulous cleaning, sorting and hand spinning.
- g. The art of pashmina shawl making has passed down through generations since the art of its making.

Historical perspective:-

Origin & Development:-

Historians unanimously acknowledge the contribution of beautiful environs of Kashmir on the Socio-cultural life of Kashmir. Historian G.M.D Sofi mentions in his greatly appreciated work on Kashmir "**KASHIR**" that the beautiful natural environment of Kashmir naturally creates in the minds of its inhabitant's keen and intelligent appreciation of nature and its beauties. The artistic faculty of the Kashmiri received great stimulus from the beautiful surroundings in which they lived. The variety of color and form, the subtlety of design, the kaleidoscopic change of landscape had their effect on the imaginative and thoughtful Kashmiri. He reproduced with marvelous accuracy the most complicated patterns found in nature, reproducing the colors and designs of nature in this process the Kashmiri artist attained a mastery and perfection all his own.

It was in this backdrop the Pashmina fabric emerged from the picturesque landscape of Kashmir. According to Dr. A. Coomara Swami, none excel in beauty of color and texture and design of the famous Kashmiri Shawl. The Pashmina fabric produced in Kashmir is said to be as old as the hills. It is stated to have flourished in the days of the Kurus and Pandavas.

Pashmina weaving in ancient Kashmir:-

In ancient Kashmir Pashmina shawls were woven by the weavers called **Tantuvaya**. Tantuvaya is regarded as a Sudra by Patanjali in Mana Bhasya, and as such were excluded from the sacrificial rites. Being oppressed class they en-mass embraced Islam. Tantuvaya still exist with surnames of Tantray and Dander.

Sir John Irwin, the Keeper of the Victoria E-Albert museum London, writes in his famous **PUBLICATION "THE KASHMIR SHAWL"** that the finest Pashmina is synonymous with the name of Kashmir. The manufacture, for which Kashmir is celebrated throughout the world, is that of the light, warm and elegant article of dress which forms its native appellation is known as the shaal.

Ahsan in his paper included in the Koshur Encyclopedia (Encyclopedia of Kashmir published by the J & K Academy of Art, Culture and Languages) is of the opinion that originally, the word shaal is a Turkistani word, meaning a **blanket**. The etymology of the shawl has been discussed by Abdul Ahad in his book, Kashmir to Frankfurt and he says that this word exists in Persian, Arabic and English, denoting a kind of very soft and delicate woolen cloth of Kashmir, worn on shoulders.⁽⁴⁾

The weaving of Pashmina shawls, it appears was known to Kashmiris prior to the Christian Calendar Era. In about 125 B.C the Chinese do provide us with the information about Kashmir and Kashmiris. **Han Shu** which is the official history that provides us unique as well as interesting information about the life style of Kashmiris and their talent of producing the fine fabrics. **The earliest references about the Pashmina have been from the Chinese, Pilgrim Huien Tsang who traveled to India in 631 AD and stayed in Kashmir for almost two years.** The Pashmina fabric was woven in Kashmir as small time craft by the peasantry before the medieval period. It was after the arrival of Sayyads from Central Asia, called Sadat, to Kashmir in 13th century and with the establishment of Muslim Rule that the Pashmina manufacturing became an organized industry. By the beginning of Islam in 19th century they continued to use warm clothing despite conversion to new religion. With the arrival of Mirza Haider Kashgari (Duglat) in 1541, he brought the fleece of Pashmina goat from Ladakh with the help of a Persian craft master Naghz Beg. He produced best Pashmina shawls.

Pashmina during the Sultanate Period (1150 AD – 1586 AD):-

The Sadats who organized Islam in Kashmir were themselves great craft masters. They encouraged this craft and brought specialized weavers for the improvement of this craft. It is also stated that Pashmina, as organized industry

was founded by Mir Saiyyad Ali Hamadani in 1378. Mir Saiyyad Ali Hamadani, well known as Shah-I-Hamadan (1314-1385), who was the spiritual leader of the Sadat was also a social reformer. To secure the freedom of man, he placed great emphasis on Akl- I- Halal, earning the livelihood through means of income. That is why Sadat took up crafts as means of livelihood. They blended Iranian arts and crafts with the existing Kashmir crafts. As a result of it a refurbished image of Kashmir textile crafts came to fore. Thus the Pashmina shawls were manufactured with value additions of embroidery. It is said the "Hashiya" (Border design) to the Pashmina shawls has been introduced by Sayyed Ali Hamdani.⁽⁶⁾

From the Rajtarangi of Srivara we learn that under Sultan Zain-ul-Abideen (1420-70 AD, popularly known as Badshah by Kashmiris, Kashmir had become famous for Pashmina made shawls. When the Mughals conquered Kashmir in 1586 AD, Pashmina as an industry was well developed in Kashmir.⁽⁷⁾

Traditionally Pashmina fabric called Alwan was used to make many articles of clothing. Blankets, socks, Jamas, caps, gowns were also made out of Pashmina apart from shawls, patkas, women scarves, floor coverings and table covers.

Mughal Period (1586 AD–1752 AD):-

Under the Mughals regular shawl trade was established and the industry was organized to produce the shawls with unique craftsmanship so that it could be worn by the royalty and their courtiers. Prior to the Mughals sultans of Kashmir patronized this industry with a dual purpose. (1), the magnificent fabric could be developed with exquisite designs to suit the aesthetics of the royalty, and (2) to be sent outside Kashmir as gifts or presents to the monarchs and rulers. With the passage of time shawl making became a profitable trade and the industry thrived. The number of looms increased from 2000 at the beginning of the Mughal rule (1586-----) to 40,000 during the reign of Aurangzeb (1658—1707).⁽⁸⁾

The Mughal king Akbar patronized the shawl manufacturing units (Karkhanas) in the valley and commissioned making of special types of shawls for the royal family, his courtiers and subsidiary Rajas and Maharajas. His interest in Kashmiri shawls was chiefly due to the royal monopoly in this fabric. He specifically ordered the think tanks in his court for innovations in both the method of production and the **flyte**. His direct support influenced the Pashmina making since these days the Pashmina was produced in the three prominent weaves which still exist as today: It is also known that during his reign Akbar brought designers and weavers from Iran to improve the quality of shawl weaving. 'His royal decree initiated important exchanges between these two textile weaving lands that culminated in the immigration of Persian merchants and traders who like their European counterparts two hundred years later, began to organize the small scale Kashmiri Cottage Industry of shawl weaving into a much larger enterprise.⁽⁹⁾ In Tuzki-i-Jahangiri, Jehangiri the king describes Pashmina as one of his favorite items of dress.

Labour Organization (Portrayal of 18th century):-

George Forester, visiting the valley just after the end of the Mughal rule, was told by the Kashmiris that there were 40000, looms at that time, each giving employment to three men at a time, which indicates that labour organization had reached to its zenith at that time. At the end of the 18th century 24000 looms operated in the valley, giving employment to 72000 weavers. According to an English veterinary surgeon, William Moorcroft who traveled to Kashmir in 1821 mentions that 1, 20000, people out of the total population of 800,000 were employed in this industry alone. According to statistics available, the numbers of weavers drastically came down to something around 12000- 3000 after 1828 for which there were several factors which have been responsible to it , described in the relevant chapter in this document.⁽¹⁰⁾

Post – Mughal Period (1752 AD):-

The central Asian trade with Ladakh existed long before Maharaja Gulab Singh's conquest of western Tibet. This is borne out by the treaty signed between him and Tibetan Government (1842). The treaty guaranteed the "export-of Pashmina wool and tea by way of Ladakh in accordance with the ancient usage". The trade route from central Asia to India which passed through Kashmir gave to the state, from commercial point of view, a unique importance which was recognized by the Government of India by the commercial treaty of 1870. This treaty guaranteed to the state the right to levy its own customs and establishing reciprocity of relations with regard to transit duties.¹¹

Later, in 1851-52 another agreement was entered into between the Government of Tibet and Jammu & Kashmir under which the details of facilities afforded to traders were regularized. According to this agreement the Ladakhis

were required to provide the Tibetan Traders with accommodation and servants as usual and render them any other assistance according to the old established custom. It also provided that the (GARPOUS) Tibetan Govt. officials will ensure that tea and woolen goods arriving at Nagri shall be sent only to Ladakh and not to any other place. The agreement also provided that the rates of customs duties and market supplies be fixed by mutual consultation. It will be seen that both the Tibet-Kashmir treaties were intended to preserve and promote commercial relation between the two countries. Commercial missions and presents were regularly exchanged between the two governments.

Before the treaty of Amritsar, (1846) Maharaja Gulab Singh had conquered and annexed to his principality of Jammu, the tract comprising the Jammu province and also the entire provinces of Ladakh and Baltistan which were about 45000Sq. Miles area. When Maharaja Gulab Singh conquered Ladakh, he not only assumed the ruler ship, but also took over the possession of the former rulers of Ladakh into Tibet. With the decline of power in Ladakh its rulers lost control of their extensive dominions in western Tibet but the area of land remained with them until the conquest of Ladakh by Maharaja Gulab Singh. This area existed as an appendage of Jammu and Kashmir State, and the state derived revenue from it.¹²

The events in central Asia, however, took a different political turn in 1869, when Ataliq Ghazi who had then consolidated his authority in Eastern Turkistan, sent an envoy to the Viceroy. The envoy presented his credentials before Lord Mayo in March (1870), and requested that a British officer might accompany him back on a friendly visit to his master, the ruler of Eastern Turkistan, Lord Mayo, selected an eminent civilian Sir Douglas Forsyth for the work. According to W.W Hunter in his book "Life of the Earl Mayo" Mr. Forsyth was instructed to go to Yarkand the Southern capital of Eastern Turkistan, on a merely friendly visit with a view of obtaining information regarding the country and removing the obstacles in the way of our already existing trade with it.⁽¹³⁾

Pashmina weaving remained a small time craft of the Peasantry of Ladakh who used to produce Pashmina for two purposes: (i) For native population (ii) For export market of Central Asia. Las (Lahasa) was the main centre of trade for Kashmiri's. Some of the Kashmiri's settled in Lahas and married the local women. Today there is sizable population who are called Kashmiri in Tibet. Some of these families renounced their homeland and came to Kashmir after the Maoist Cultural Revolution to save their identity and religion. These people are now settled in Badamwari, Srinagar.

In Kashmir, there was a prominent business class who would trade with Tibetan businessmen and would chiefly trade with pashm and Pashmina. They were called Tibet baqal. Tibet baqals still exist in Kashmir, although some of them don't carry on their traditional business but still their surname is indicator of their past activity.

Kashmir Pashmina in European Market:-

According to an account narrated by a well-known Kashmir historian, Anand Kaul Bamzai, as early as 1519 AD 'the Kashmir fabrics, even of finer kind must have been known in the west of the Europe as may be inferred from the tradition that the light veil fastened by a thin golden thread over the forehead covering the back of the head and falling on the shoulders, of the Leonardo da Vinci's famous portrait of Mona Lisa, wife of the Francisco of Giocondo a citizen of France, was in reality one of those early Kashmiri fabrics that could be drawn through a lady's ring as a test of its fineness i.e. fine Pashmina, since then a special Pashmina scarf is marketed in Europe as 'Mona Lisa Pashmina'.

According to another account it is said in 1796 AD, during the administration of Abdullah Khan, the afghan governor of Kashmir, Sayyed Yahya, a blind noble from Baghdad who visited Kashmir was presented an orange coloured Pashmina shawl by the governor as send off gift. The Sayyed presented the same Pashmina shawl to the Khedive in Egypt who, in his turn offered it to Napoleon Bonapart, then engaged in the Egyptian campaign. Napoleon passed it on to his beloved future Empress Josephine. From that time these beautiful eastern warps (made in Kashmir) became fashionable for beautiful western shoulders in Paris and else where, writes Sir Walter Lawrence in 'the valley of Kashmir'.⁽¹⁵⁾

The Empress is reported to have owned several hundred Kashmir shawls and she is generally regarded as the most important factor in what has been termed the sudden migration of the Pashmina from its exotic homeland in the foothills of the Himalayas to the salons of early nineteenth-century Europe. Not only did the Pashmina based apparel designs become one of the most sought-after fashion items of the nineteenth century, but it was also put to practical and decorative use as a cover for beds, and as a drape over couches, chairs, pianos and tables, providing beauty,

warmth and most of all, prestige. The Paris Journal des Dames et Des Modes in 1815 noted: "And the things ladies would have to do to obtain one of these precious pieces of material. They would invent a thousand reasons why they had to have one. The richest only needed to say that it was the fashion; the middle class women needed to look like everyone else; and the poorest women claimed that cashmere would be good for their health and would last longer than anything else. Even if there was no other reason, women would resort to the refrain that a cashmere shawl was the only acceptable proof of true love".

By the 17th century, Kashmir Pashmina apparels with different kinds of ornamentation had become Fashion in Europe. In response to foreign tastes, the traditional designs were replaced by or adapted to patterns supplied by foreign dealers. France and Great Britain established mechanized shawl industries, one of the most important centres being Paisley, Scot, where the Kashmir or rather 'cashmere' shawls was imitated and woven entirely by machine. This cheaply produce article offered keen competition to the genuine one and forced Kashmir weavers to compromise on quality and to imitate the designs from the Paisley workshops.⁽¹⁷⁾

These efforts were not successful, and after France was defeated in the Frano-Prussian war by about 1780, the Pashmina manufacturing received a major setback and lost its markets in Europe and Russia. Adding to these adverse external causes was also a disastrous famine that decimated the entire weaving community leaving just about 148 weavers in 1911.

For a length of time, though there was a regular supply of Pashmina shawls to India, it seemed as if that the unbelievable skills of the past were lost. But fortunately these extraordinary skills and knowledge of Pashmina shawls were not completely lost as most of the artisans had shifted to the carpet industry and continued to practice many of the techniques in making carpets which were originally associated to the shawls of Kashmir.

The pashmina industry of Kashmir is a crucial economic contributor to the state and to the country as well. However, the industry is facing a lot of challenges due to the intervention of modern machinery and also increased competition from various countries. In this context the study is meant to provide a broad framework for providing an in-depth picture of the cluster in order to identify the obstacles faced by artisans and traders who are related with this trade and also the feasible steps to be taken for the overall sustainable growth of the cluster.

Methodology for Diagnostic Study:-

A detailed methodology was followed to gather information on the cluster, identify the main actors and collect trade and business data from them. A range of tools including Questionnaires, one-on-one interviews, focus groups and surveys were used to collect the required information. The following is a break-up of the methodology used:

Desk research for secondary Data:-

Scanned books, documents and other reading material for initial archival material on history of craft, crafts process, design repertoire, local dynamics and existing linkages to markets.

Primary Data collection:-

Field scan and field visit:- Identified and met the individual artisans, master crafts persons and entrepreneurs working in the area to explore as potential local project partners and resources. Also scanned for existing government schemes in the area.

Data Compilation:

The primary and secondary data collected was compiled for the purpose of comprehensive analysis regarding status of the cluster, key issues and required interventions.

Preparation of Study Report:-

Based on the compiled data, a report was thus prepared

Findings:-**Problems of artisans:-****Problem of labour:-**

The most acute problem for the pashmina artisans of Kashmir is the labour issue. The average income of artisans ranges from Rs 200-250 per day and if full year is taken into consideration, it may go further down to as much Rs 150 because demand keeps on fluctuating and days taken for the preparation of warp don't fetch the same amount of money as weaving yields. The average income of labourers is very low as per the present market value.

Since machine spun yarn is stronger and doesn't cut while weaving, an artisan finds it more friendly and therefore takes them lesser time to complete a shawl and as such increases their income proportionately. An artisan weaving machine spun yarn can earn Rs 2000-3000 more compared to the one using hand spun yarn. This is the reason that many seasoned hand spun yarn artisans are switching over to machine spun yarn as their monthly monetary needs are high because of high market value. Reasons of the low labour can be summed up as under:

1. Due to the rising cost of the raw materials.
2. Decreased demand due to Introduction of fake pashmina shawls in market.
3. Artisans have no particular union of their own where they can fix the rate for their labour. Manufacturers find a number of options
4. Artisans themselves are ready to work on low labour as they don't have any source of earning their livelihood.
5. Ban on "SHAHTOOSH" is also one of the reason of their low labour. When they were used to weave Shahtoosh shawl their earning was double as compared to Pashmina Shawl.
6. v) Artisans have the lack of information of Labour rights.

No financial support:-

Majority of artisans don't have their own loom and other resources to work for their own piece and as such they are bound to work for manufacturer on his conditions.

Majority of them are from poor economic background and therefore they mainly face economic problems. A larger group of artisans don't have even resources to setup their own looms. Also there are artisans who have setup their own looms but they still find it hard to work for their own product. As per the artisans, they require a substantial amount to start working for their own product because they have to pay for the raw materials in cash and also they get the payment for the shawl only after completion of the shawl and that too in installments. As a result, their money gets blocked in the market with traders thereby making it necessary to have more money with them to start working on next product because if they wait for the money of the finished product, they will be losing a number of working days. The compulsion to quickly sell the product due to poor financial conditions makes it very difficult for the artisan to move forward in the business. Also, there is always a threat of cheaters in the market which makes it very difficult for the artisan to take a risk of working on their own products and sell them on their own. They have utilize the already developed channels to push their products in the market and cannot take chances.

While most of the artisans wanted financial assistance in order to start working on their own products or take their business activity to next higher level but Some of the artisans didn't want to go for loan facility as they were of the opinion that it is difficult for them to repay with interest since the market conditions are not very attractive to take risk of paying interest and can be a problem.

Lack of information:-

All the artisans were found to spent the major portion of their day at their looms without being bothered about the happenings outside. As a result majority of the artisans don't have any awareness regarding various activities affecting their craft directly or indirectly. Majority of the artisan were found to be unaware about the various artisan schemes which are meant for benefiting the artisans and to take them out of the shambles.

There were artisans who had some knowledge about the various schemes being provided to them and they had applied for the various schemes but the length procedures and the poor response being showed to them by the authorities had made them disinterested in any such activity and they considered every such activity as the sheer wastage of their time during which they could at least earn their basic labour. A number of artisans had been asked for pay bribe in order to forward their cases for the allotment of the funds. The poor artisans found it miserable to pay bribe for the loans which they were supposed to repay with interest.

They also faced a problem in terms of guarantors or mortgage with the banks and a number of cases where all the formalities had been completed by the artisans were dropped because of the conditions of the bank in terms of guarantors. We also came across cases where bank employees had been asking for bribe in order to get their loans sanctioned by the bank.

Shahtoosh ban:-

Majority of artisans want that the ban on Shahtoosh to be removed as early as possible as their income would increase. The artisans performing the same work on Shahtoosh shawl as being done on pashmina product would fetch an income almost double. The artisans were demanding immediate end to the ban on Shahtoosh and wanted the raw material to be removed from the Cheru without killing the animal.

Inaccessibility of market for independent artisans:-

Working for own products invites a number of problems and risks for the artisan and one of them is the availability of the market for their products. Artisans working for their own products have to look for the customers themselves and since they will be having production on a smaller scale, they have to look for the customers in the vicinity or domestic market in order to make the efforts of making their own product cost effective. Financial conditions don't allow them to collect their manufactured products and then look for customer. Hence it is very difficult for them to get the better customer for their products and the resultant is that they quit to work independently and prefer to work for their master where they face no problems of market since in that case they are bothered about their labour and have no concern about the end utilization of the products being manufactured.

We also came across a small group of artisans who had sufficient resources on manufacturing side but were facing the problems of market and they demanded the support of the Govt. in making outlets available at tourist spots in peak tourist season on lease or rental basis in order to make it possible for them to come in direct contact with the customers.

Registration problems:-

Majority of artisans are not registered with any group /association/Govt. Departments and they are being deprived from the privileges given by State or Central Government to Artisan groups. Artisans want the process of registration to be made easy for them and benefits should be provided to them. Artisans found it difficult to fulfill the formalities of registration as it is a time consuming process and it is not possible for local artisans to lose his working time in completing these formalities.

The general perception of the artisans about the registration was found to be very poor. They considered these activities as a time wasting affair since they can follow these things at the cost of losing their working time. The majority of artisans were found to be unaware about any such organization or the registration benefits.

Involvement of middlemen:-

A number of middlemen actively involve themselves in the various places of the supply chain. According to artisans the involvement of these middlemen is responsible for the fluctuations of the prices of both the raw materials as well as the end products. Those artisans who make their own product don't find it easy to have direct access to the raw materials and believe that it is only upper class of the pashmina segment that has control over the raw material. The middlemen buy the raw material from the suppliers of Ladakh and supply it to machine owners as such there is a scarcity of raw materials in the market and the local artisan requiring the raw materials in smaller quantities don't find it accessible. Some people also buy raw material in bulk and then dump the raw material and sell it higher prices to the local artisans thereby making it difficult for them to be cost effective in manufacturing their own products. On the other hand, they can't sell manufactured products directly to the customer either because of the involvement of middleman there. They have to sell their products to the middleman (known as dalaals) at a little lower rate. The middlemen then sell it other people higher up in the hierarchy which has the customer as the terminal point. As per the artisans it is these middlemen who reap the benefits for the hard work which is being done by the artisan in manufacturing these products.

Old age problem:-

The artisans were found to be of the opinion that they can earn till they are fit health wise and as they grow older they cannot work as hard as they could in younger days. The artisans mainly kani artisans were found to face many health problems especially eye & neck problems. Since in old age a person suffers from a number of health problems which require money to be cured and taken care of. Since it is not easy for an artisan to work in the older

days of their life and also they don't have any source of income apart from their labour they considered themselves in dire need of proper support from the Govt. in the form of old age pension or some other financial support so that they could survive & can fulfill their basic needs.

Use of new designs:-

The artisans work for their masters and the designs to be made are provided by them to the artisans. The artisans were found to have no say in the designs and they were only concerned about their labour at the end of the product. As per the artisans the designs are mostly the older ones and they make new designs only when an order is received. There is a lot of hesitancy in experimenting new designs from the masters.

Many artisans who make their own product were also found to have lack of awareness about the modern market preferences for designs and as such repeatedly use the old designs since they cannot afford to pay the Naqash (Design maker) every time because it would take the prices up and would make it difficult for the products to be sold in the market. As per the artisans, if they pay the Naqash few thousand rupees more for a new design, they later find it very difficult to motivate their buyers in accepting new designs where they are asked to pay a little bit more.

Introduction of machines:-

Artisans were found to be divided on the introduction of machines since some of them favored the introduction while as majority of them considered it to be the reason for the downfall of the pashmina business. While almost all the artisans said that the machine introduction for dehairing & cleaning is good since it has speeded up the production process. However the spinning machines are not good indication.

As per the artisans the machine spun yarn is stronger and doesn't cut while weaving weave as such allows an artisan to weave more shawls per month and as such increases their monthly income, however, the spinning machines are taking out the essence of hand spinning out of the pashmina shawls which has played a vital role in giving pashmina shawls a distinguishing status in the minds of the customers in widespread areas of the world. The machine spun yarn is a bit thicker than the handspun yarn which distinguishes it from the handspun yarn. The hand spun shawls are softer, finer and more has a higher life than machine spun shawls and also shawls made from the machine spun yarn face a lot of bobbling problem which is minimal in shawls spun from hand spun yarn.

So machine introduction was found to be favorable for the artisans but the many of them accepted that they are themselves harming the craft by manufacturing the shawls made from machine spun yarn because there will be no difference in the Kashmiri pashmina shawls and the shawls manufactured anywhere in world and blamed the lower labour for compelling them to take up the machine spun yarn.

Issues of traders/trader manufacturers:-

scarcity of raw material:-

Raw Pashmina i.e. pashm comes from the upper ranges of Ladakh region. Raw-Material is not sufficient available in the market. As per the traders, ten years ago the raw material was easily available in the market at the lower prices of 3000 per kg which is presently priced at 10000 per kg. In addition they had a easy access to raw materials in those days, but nowadays they are not provided with sufficient raw material.

Kashmiris have no direct access to raw material and they have to refer the middlemen and it is these middlemen who get profit from both the sides i.e. from the Ladakhis (seller) and from Manufacturer (buyer) and thus it is the involvement of these middleman whose involvement is resulting in the rapid increase in the prices of the raw material.

The cost of Raw material has more than doubled in a last 10 years which has taken it out of reach of small scale manufacturers to buy their own raw material in bulk since they have to pay in advance for raw material and as a result they find it economically feasible to work for other manufacturers who have ample resources to buy raw material in bulk.

Traders suggested access to financial support from the Government in order to be in a position to buy raw materials or availability of raw material depots so that they would raw material at a little lower cost allowing them to induce cost effectiveness for their products.

Women folk abandoning spinning:-

According to the traders, one of the big setbacks to the pashmina craft has been the women folk giving up spinning of pashmina. The raw material procured is given for spinning to women folk who use traditional charkhas called yeinders. The women folk use spinning wheel for spinning the pashm to obtain the yarn from the pashm. The women folk are provided one Tola of pashm for Rs 90 and they are given Rs 1 for one gund (9 threads of 9 inches/ 12 threads of 11 inches) and one tola of pashm is spun into 200-250 gunds depending upon the fine spinning of women. The hand spinning of pashm incurs around Rs 8-9 per gram for spinning. Hence women today can earn 100-150Rs for spinning one Tola of pashm which previously used to fetch them almost 200Rs as cost of one Tola was lesser and quality of pashmina was far better.

Presently spinning can fetch a woman about 10-15 Rs in a day as such women find it better to do something else other than spinning.

The women giving up spinning is a major problem because hand spun yarn is becoming scarce and difficult to find as a result prices are rising for hand spun yarn. The decrease in the supply of hand spun yarn is making things easier for machine spun yarn to overtake the market.

Adulteration of raw material:-

With the introduction of machines for spinning, the raw material is being obtained by the machine owners in large quantities and is producing the machine spun yarn at a very large scale. Many traders said that while spinning the machine owners are mixing 70% of the Chinese pashmina being of low quality with the 30% of Ladakh pashmina which is of good quality, to make pashmina thread and sell this mix thread to the manufacturers in the name of original Ladakhis pashmina.

The decrease in the supply of hand spun yarn because of women giving up spinning is allowing the machine owners to produce more and more mix yarn. The mix yarn is taking up the place of hand spun yarn and is thus making things tremendously difficult for hand spun products and the people involved in the hand spun pashmina products.

Improper management of arts emporium:-

They said that arts emporium was basically meant for the purpose of providing the authentic products to the customers from all over the world who visit Kashmir. They alleged that the whole management system in the Arts Emporium is defunct and hasn't played the role for which it was meant. The traders said that the arts emporium could have been a very vital platform not only for the traders but also the local artisans who could have grown up with passage of time provided the emporium would have played the basic role with honesty and morality.

The traders also alleged that the various people of the emporium have been concerned about their own commissions and not the quality of the products being made available for selling, as such it is the wishes of the people over there which are supreme and not the quality and fineness of the products.

As per the traders, there have been cases of arts emporium selling products of angora, toosha etc in the name of pashmina products which has degraded the image of the emporium in the minds of the customers and hence nowadays customers don't prefer to buy products from the emporium, which has not harmed the people involved but the craft as a whole and as a result the artisan class of the Valley. The Traders demanded that the Govt should take some solid and immediate steps in order to regain the lost glory and sheen of the arts emporium so that it could bring some comfort to the artisans as well as the traders of the Pashmina in the Valley.

Registration problems:-

Many traders are not registered with any group /association/Govt. Departments and are thus deprived from the privileges given by State or Central Government specifically for these groups. The general perception of the traders about the registration was found to be very poor. They considered these activities as a time wasting affair since they can't afford to follow these things at the cost of losing their working time. Some of these people were found to be unaware about the existence of any such organization or the benefits.

The people who had information about such organizations and the benefits meant for them wanted the process of registration to be made easy for them and benefits to be provided to them without having to spend money for getting the formalities to be completed. Since they had already faced a number of problems to fulfill the formalities of registration. They had already wasted a number of working days in following their cases and now were found to

have lost all the faith in the system and considered any such activity as sheer wastage of time, efforts and as well as money in terms of expenses and also working time.

Shahtoosh ban:-

Most of the manufacturers said that ban on Shahtoosh should be removed as it effects their earnings. They used to earn more in Shahtoosh than the pashmina products. The time taken to complete Shahtoosh products is same as that of pashmina but the earnings are double for artisans as well as manufacturers, so Govt should take steps so that the chiru animals should not be killed as well as Shahtoosh ban be removed and their earnings will increase in future. The traders demanded to find a way out to obtain the Shahtoosh from the chiru without endangering the life of the animal. Many traders were found to be of the opinion that the shawl business headed for the downfall the moment Shahtoosh ban was implemented.

Fake selling:-

The traders were of the opinion that it was positive perception in the minds of customers outside Kashmir that made Kashmiri shawls sell like hot cakes. But the market situation has changed and the perception has changed altogether thereby making it extremely difficult for the products to be sold in market in present situation. They had a number of reason to be counted as responsible for the downfall which mainly encircled on the dishonesty of the people involved.

The traders believe that fake selling is one of most dreadful threats for them as the customers are being sold fake shawls in the name of pure Pashmina products. There are a number of people who have started this business without having any prior attachment to the craft. They are doing the business with shortest time horizon in their minds and are just bothered about their short term benefits without being bothered about the future of the Craft.

The middlemen are involved at various stages of the supply chain and their existence is harming the craft since they are mostly found to be concerned about their own profits without any alienation towards the craft. They take the business as the short term opportunity to create profits for themselves and don't mind harming the craft for the sake of their own profits.

Shawls manufactured at different places outside Kashmir like Amritsar are also being sold under the banner of brand Kashmir. By this the originality of Kashmiri pashmina products is being degraded and it becomes difficult for the manufacturer to sell original product at same rate as obviously the original product is costlier than these fake products. The customers are being provided with a diverse range of fake products at lower costs as such the original products find it difficult to face the market.

Low literacy levels and modern market needs:-

The most common thing which was found to exist at every stage of the cluster was low literacy level. The traders as Artisans were found to be mostly illiterate and ignorant and hence were having altogether different perception of things and market. Majority of traders were found to be of traditional ideology of producing what they been producing for past so many years and didn't seem to be aware of market happening outside. They lacked the basic requirements of modern business strategies.

Modern customer needs are very different from need in the past. However, the traders were found to be indifferent about the change in the taste and need for the infusing some positive changes in the products and also the market channels utilized by the traders.

Introduction of amritsar shawls at national and international market:-

The traders were found to be of common opinion in case of the Amritsar shawls as a threat to the pashmina industry of Kashmir. All of them considered the Amritsar shawls as major threat to the Kashmiri shawls as they are maligning the name of brand Kashmir. The problem is that the Amritsar shawls are being sold by the name of the Kashmiri shawls made from pure pashmina when in reality they are neither made in Kashmir nor are they manufactured from pure pashmina. This fake selling makes is extremely difficult for the authentic Kashmiri pashmina shawls to occupy the place in the market since the customers don't have the exact knowledge and recognition of pure pashmina as such they easily fell prey to the fake products. In present scenario People mostly prefer Amritsar shawls because of the following reason:-

- ❖ These Shawls are Cheaper than Kashmiri Pashmina Shawls as these shawls are purely machine made and the raw material used is a mixture of pashmina and different wools which makes it very cheap in comparison to the Pashmina.
- ❖ Artisans from Amritsar are introducing various varieties every year that are very tempting for people. Amritsar shawls are more attractive and adorable than Kashmiri Shawls. These varieties are possible because of machines but then they sell those machine made products under the banner of handspun shawls which is a trap for less knowledgeable customers.
- ❖ Kashmiri Artisans use traditional way of weaving and it is impossible for them to match the production scale of the machine made shawls as such gives rise to an opportunity for the machine made shawls to occupy a secure place in the market.
- ❖ There is no trademark or patent for Kashmiri Shawls which would make a clear cut distinction between the original Kashmiri and the fake products.
- ❖ There have been few cases where outside traders were found to develop a wrong perception in the minds of people by telling that Kashmiris kill animals to make Pashmina Shawls and Government of India has banned it and the persons who buy these Shawls will be severely punished.

Fixed rate system(frs):-

There is no fixed rate system for Pashmina items and the resultant is that few traders, who are new in this trade and want to cover market, sell their Pashmina products at low rates. They earn a little profit and in return it becomes problematic for other traders as customers get confused by varying rates which then results in the customers demanding all the products at cheaper rates.

The traders felt an urgent need of a systematic functional body which would be responsible for fixing rates for different products as per the content of pashmina and the quality of product. This would enable to check out those black sheeps who are harming the trade by destabilizing the rates.

Domestic market reshaping:-

As per the traders, there is an immediate need to reshape our own domestic market of Kashmir in order to enhance the pashmina business activities here so that the local artisans would themselves come to know what is the trend to be followed in the market in order to be on top of the market and customer's minds. The market has to be revived here in order to bring pashmina back on track because the absence of an organized market gives an opportunity for maligning the pashmina products and exploitation of the artisans. The traders rightly believed and considered the artisans as the backbone of their business and wanted them to be very informative and creative in their work which they believed can be achieved if the gap between the market and artisans is reduced.

Defunct training centres:-

The training centers which were set up for teaching the crafts to the desirous people and to enhance the skill of the learned artisans didn't meet their purpose and the people slowly opted out of these centers. They were initially paid handsomely for learning the craft but with the passage of time the money being paid for learning the craft was not enough to attract them. Also the teachers of these centers were using the students to do the work which was their personal requirement and not related to the skill enhancement.

Skill and dedication tradeoffs:-

Since the daily expenses of the modern times are very high and the income of the artisans is very low, the artisans are found to compromise on the grounds of skill. The trader consensus was found to be built on the notion of skill-dedication complementarity. Many traders believed that the real skill of craft is not delivered because the artisans are not working with the same dedication since they are being under paid and therefore they want to work on products which would be easier to work on.

However, the market demand for the skill is ever increasing and the customers of modern days want innovative designs every time but the artisans are not ready to do those masterpiece skill works for the income they are being paid. The perception built over the years for the kashmiri pashmina products is getting a hammer as the customers are not ready to buy the same products every time and the artisans are not willing show their skill for the feeble incomes.

Also the traders believe that the people who have learnt the craft recently are not as skilled as their masters and the real art is not being passed onto the new learners. The real craft of hand spinning the Kashmiri pashmina is thus dying a silent death.

Consignment basis trade of arts emporium:-

Arts emporium was established with the purpose of giving a cushion to the traders where they would be selling their products but now the goods are delivered to emporium with the understanding that payment for the goods is only made once the goods are sold. The traders don't find it useful and are hence very hesitant in delivering their goods because as per the traders they cannot afford to keep their costly goods in the custody of the emporium where they themselves cannot play any role in selling those goods. There have been cases when the traders were returned the goods at the end of the season with the justification of lesser demand for the products and the goods being returned were not in a good condition and it incurred extra expenses to give them finish again for selling them in the market.

Export trade is time specific:-

Export orders are to be completed in a specific period of time and the traders are looking to get orders of higher magnitude. This results in compromise on quality since they are running after the quantity. In order to compete with the manufacturers across the globe the orders are to be completed in the specific time period which compels the manufacturers to compromise on the grounds of quality.

Conclusion:-

During the research the data reveals that artisans and the traders/manufacturers who are related to this trade faces many obstacles like rising cost of raw material, decreased demand due to introduction of fake pashmina shawls in the market, lack of information regarding market trends and labor rights etc. Artisans face labor problems as well, as they themselves are ready to work on low labor because they don't have any other source of earning their livelihood. Also majority of the artisans are from poor economic background and therefore, they mainly face economic problems and hence they are bound to work for manufacturers on his conditions. It is also found that most of the artisans didn't want to go for loan facility as they were of the opinion that it is difficult for them to repay with interest. Majority of the artisans were found to be unaware about the various artisan schemes as they spend major portion of the day at their looms and hence are unaware of these schemes. Artisans also considered the introduction of machines to be the reason for the downfall of the pashmina business because machine spun yarn are not much durable and hence it leads to harming of craft.

Traders/manufacturers have their own problems like they face scarcity of raw material as kashmiri's have no direct access to raw material. Traders suggest that there should be raw material depots to have easy access to raw material. During the study it is also found that the women giving up of spinning is major problem as hand spun yarn is becoming scare and difficult to find and due to the reason machine spun yarn overtake the market and because of women giving up, spinning is allowing the machine the machine owners to produce more and more mix yarn which inturn degrades the quality of pashmina and hence decline its image as well. Also as per traders, arts emporium lost its glory and haven't played the role for which it was meant. As per traders, there have been the cases of arts emporium selling products of angora, toosha etc in the name of pashmina products which has degraded the image of emporium in the minds of customers. Fake selling of shawls in the name of pashmina products are one of the dreadful threat for customers, due to this reason the perception regarding pashmina in the minds of customers has changed and hence the market situation too. The most common thing which was found to exist at every stage of cluster low literacy level and modern market needs due to which it becomes difficult about the changes in the taste and product as well. Introduction of Amritsar shawls are also a threat to pashmina industry of Kashmir as they are maligning the name of brand Kashmir and are being sold by the name of Kashmiri shawls made from pure pashmina when in reality they are not manufactured in Kashmir and is not pure pashmina. From the research it has been observed that there are various obstacles faced by artisans as well as traders at various stages of cluster so there is an immediate need to reshape our domestic market of Kashmir in order to enhance the pashmina business activities so that the local artisans would themselves came to know what is the trend to be followed in the market in order to be on top of the market and customer minds. The traders rightly believed and considered the artisans as the backbone of their business and wanted them to be very informative and creative in their work which they believed can be achieved if the gap between market and artisan is reduced.

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