

Analyzing the Competitive Business Position of Dhakai Jamdani and Investigating the Export Decline Reasons of it in the Recent Years

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ABSTRACT

Purpose: This study plans to identify the competitive business position of Jamdani Saree and Jamdani accessories of Bangladesh and also investigates the specific reasons of export decline of Jamdani and its diversified products in the recent years.

Methodology: This qualitative research has used Braun & Clarke (2006) thematic technique along with Michel E. Porter's (1979) five forces of competitive position analysis to analyze, cross & develop the themes and identify the research objectives.

Findings: Findings of the first objective revealed that Jamdani holding medium competitive advantages over others products among its industry. Another objective, identified some specific causes of export decline such as coordination gap among players, unaware about buyer's tastes, complex export procedures, lack of incentives, shortage of skilled weavers, low product diversification, lack of capitals and insufficient promotional activities.

Practical Implications: Jamdani export was contributing significantly even in the FY2011-2012, after that its official export volume has declined at such a rate that no record of export of Jamdani and its diversified products has found in the list of Export Promotion Bureau of Bangladesh. This study will give insights to the policy makers and stakeholders to solve the identified problems of this sectors thus open way for increasing the export of Jamdani products.

Originality: In spite of being a GI product in Bangladesh, there were conducted few research on Jamdani and none of them related on the potentiality of Jamdani as business products and also no research investigated the export decline reasons of Jamdani from Bangladesh in the recent years.

Limitation: Though this study has tried to include all stakeholders but due to complexities created by Covid-19, some stakeholders were missed.

1. Introduction

Jamdani is considered as one of the most beautiful revelations of artistic talents of weavers in Bangladesh. (Rashid, 2017). It is the first Bangladeshi product that was given the Geographical Indication status. It is included in the UNESCO Representative List of the Intangible Heritage of Humanity in 2013 and recently it has got the GI (Geographical Indication) registration. (Rashid, 2017; Jamdani Sari Gets GI Registration Certificate, 2016; UNESCO, 2013). Jamdani is a hand-made fabric made of cotton, which was historically referred to as muslin. (Mahapatra, 2016, p.72). Jamdani weaving is based on the traditional knowledge and skills dating back to the fourth century BC (Khatun, 2015, p.187). As the Jamdani is fabulously rich in motifs, it has been spoken of as the most artistic fabric of the Bangladeshi weaver (Khatun, 2015, p.187). It is traditionally woven around Dhaka and created on the loom brocade, which is rich in motifs. In the first half of the

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nineteenth century, James Taylor described the figured or flowered jamdani; in the late 19th century, T. N. Mukherji referred to this fabric as jamdani muslin (Glassie & Mahmud, 2007). In spite of having so much popularity, Jamdani products specially Jamdani sarees are not exported at enough level because of some problems existed in the industry. Due to lack of emphasis, subsidy and education on creative skills and heritage-linked economy; several craftspeople, domain experts and entrepreneurs are not harnessing their full potential. (Ahmed, 2020, p.80). Also, Weavers are suffering from inadequate payment and lower social status, and it demoralizes them if markets seek original excellence and distinctiveness of the craft. (Ahmed, 2020, p.81). Removing those problems can help the industry to be promoted and spread throughout the world properly.

Jamdani lies under the handloom industry which is from the very beginning to present days, is a source of benefit in both ways, economically and socially. It includes the weavers, manufacturers, business-persons, entrepreneurs and the users. Among all the products from handloom industry in Bangladesh, Jamdani is the most profitable despite of some problems existing in the industry. Since some years, Bangladesh is exporting Jamdani in many countries, mainly in European countries (Hossain, Sajib & Tanvir, 2017). Few international designers, institutions are working with Jamdani from Bangladesh, which is broadly known as Dhakai Jamdani. The word Jamdani alone represents Dhaka and Bangladesh with its unique motifs and material. The existing studies about Jamdani explained a lot about the traditional values, intelligent weavers and the gorgeous history of Jamdani. Existing studies also covered the problems regarding weavers poor livelihood and the solutions to improve the livelihood of the weavers. But it would be better if those studies include the global participation of Jamdani as a product in global market. In spite of being a GI product, Jamdani is not reaching to customers like other GI products from other countries. Jamdani is being exported to many countries like India, USA, and Europe and also in Middle-Eastern countries but in a very low range which is not monitored properly. Bangladesh covers a larger annual production of Jamdani and its economic value is high, but the exported amount is not measured properly in the recent years due to the exports of very insignificant amount. Previous record shows, cash incentives are given by government or assigned authority to a particular sector or industry to grow properly and make a strong position in the competitive market have positive effects. Here in case of jamdani, the several years reports of Export Promotion Bureau (EPB,1995-2020) show that Jamdani sector was provided with 25% cash incentive in year 1997, which motivated the manufacturers and exporters and it resulted in the increase of export that brought \$19.694 million. Before 1997, export of Jamdani by Bangladesh was \$0.059 million. In 1998, the cash incentive was reduced to 15% and that resulted in decrease of export of Jamdani. That year, total monetary value of exported Jamdani was \$4.488 million. And later incentive was deducted to 10% and then 5%. Afterwards the export went on decreasing year by year.

The below table shows the increase of export amount from jamdani as the increments of the incentives and the decreasing of export because of lowering down the incentives. Now in 2021, the total amount of official exports of Dhakai Jamdani and Jamdani diversified products like saree accessories, artworks, bags, home decorations, luxurious curtain, cushion covers are so little that, no record of export of Jamdani Saree and its diversified products has found in the list of Export Promotion Bureau of Bangladesh.

This situation is due to the supply chain process of Jamdani not being transparent and the only inclusion of business-persons, dealers without proper monitoring of authority. If a product of

cultural heritage is supplied in this way, it can be misused and Bangladesh may fail to manage its traditional asset.

Table 1. Author's Construction based on data from Export Promotion Bureau Bangladesh (1995-1996 to 2011-2012)

Year	Price (thousand dollars) \$	Price (millions of dollars) \$
1995-96	172	0.172
1996-97	59	0.059
1997-98	19694	19.694
1998-99	4488	4.488
1999-2000	21	0.021
2000-2001	41	0.041
2003-2004	51	0.051
2004-2005	40	0.040
-	-	-
2007-2008	45	0.045
2008-2009	40	0.040
2009-2010	70	0.070
2010-2011	80	0.080
2011-2012	60	0.060

Source: Authors Calculation

This study plans to identify the competitive business position of Jamdani saree and Jamdani accessories of Bangladesh in domestic as well as in international markets and also want to investigate the specific reasons of export decline of Dhakai Jamdani saree and Jamdani accessories in the recent years in spite of it is the first GI product of Bangladesh.

This research is qualitative in nature and uses Braun & Clarke (2006) thematic technique to analyze, cross & develop the themes to identify export decline causes from the gathered data and also uses Michel E. Porter's (1979) five forces of competitive position analysis to evaluate and asses the competitive strength of Jamdani Saree and its related products in the international market.

It is well known that the Government of Bangladesh is currently focusing more on identifying new exports products as well as export diversification of existing product line, so the study is expected to contribute in the government exports basket. Besides this study will be helpful to entrepreneurs, designers of fashion products, and business owners in numerous ways by providing them insight of entering into international market with diversified Jamdani Saree and its Jamdani accessories. Also, the weavers, suppliers, distributors and retailers will be benefited from the outcome of this study. The policy makers will get factful information and thus revise the policy and take initiative to promote Dhakai Jamdani and its related products as export products.

The following section of the paper is containing a details literature review in the relevant fields illustrating the Jamdani as export products, its opportunities and challenges of growth at domestic markets as well as export growths and barriers in international market. The subsequent section is a details methodology including the specific research approach, sampling, data collection and data analysis method followed by discussion, findings and conclusion.

2. Review of the Literature

The title Jamdani is of Persian beginning and is unequivocally suggestive of Mughal impact (Hossain, 2010). It may be a compound word wherein “jam” implies bloom and “dani” implies vase (Chakrabarti, 2016). The title is suggestive of the excellent flower themes that embellish these flawless sarees. The Bengali adaptation of the title, Dhakai, comes from the put of its beginning — Dhaka in Bangladesh. Interestingly, the most punctual say of Jamdani sarees can be found in Chanakya’s Arthashastra, dating back to the 3rd century BC (Chakrabarti, 2016). The book alludes to it as a few fine cloths from “Bangla” and “Pundra” locale. Critical mentions of Jamdani can moreover be found within the book of Periplus of the Erythraean Ocean, besides the accounts of Middle Easterner, Chinese and Italian voyagers and dealers. According to Glassie and Mahmud (2007) to the begin with half of the 19th century, James Taylor portrayed the blossomed Jamdani. The late 19th century saw the Anglicization of Established Indian concepts and thus, TN Mukharji alluded to this texture as Jamdani muslin (Glassie & Mahmud, 2007).

In spite of the fact that Jamdani has delighted in monstrous notoriety right from the starting, the craftsmanship frame blossomed amid the Mughal period. Be that as it may, colonization by the British saw a decrease within the generation of this texture (Clifford, 2018). Trade of cheaper yarn from European nations within the 19th century was one of the essential reasons for the decay of Jamdani. (Textile today.com, 2019). Too, with the decay of Mughal run the show in India, makers of Jamdani were denied of their most persuasive supporters. Towns like, Madhurapur and Jangalbad, once popular for the complicated Jamdani industry, blurred into blankness. Post the parcel, many weavers moved to show day West Bengal, which stamped the starting of the craftsmanship frame in India.

In the late 1970s, Bangladesh Rural Advancement Committee (BRAC) started initiative for the revival of old traditional heritage Jamdani again and to recreate a taste of and demand for high quality Jamdani saris and to reintroduce traditional standards and motifs to other craft media, to the commercial advantages of poor artisans (Chen, 1984, p.56). The same author also said that craft product will survive if it reflects indigenous design and evolved into diversified products over the time to meet the changing demands and tastes of the market.

In a study by M. Karim and A. Karim (2017) illustrated that since crafting communities invest their skills and merits from generations to generations in order to create and carry the artistic crafts so their work demand the right of protection under Geographical Indications (GI) laws and also mentioning the conflicting GI issues of Jamdani, one variety of Mango and Nakshi Katha between Bangladesh and neighboring India. Also, in a study conducted by Khondker (2014) mentioned the potentials utilization of GIs in favor of Bangladesh in international market.

Lots of studies were done on Jamdani about its history, its artisans, its markets and demands. The products of handloom industries are mainly exported in European Union; Jamdani is also exported to European countries and in India, but before exporting, the field of production needs to be observed (Afroje 2012, p. 7). Previous studies on handloom industries show that, the artisans live a poor, unhealthy life; there is shortage of civil facilities like electricity, water supply, sanitation; and most importantly, artisans do not get their salary properly (Rahman & Ferdous, 2014, p. 5). Consistent and sustainable investment sources are absent despite market demands (Ahmed, 2020).

The same author also said that unwillingness for adopting advanced technology, less government investment, high interest rate of banks to start a new business and most importantly, political instability actually hampers all kind of action and development plan. In an adverse situation, this potential sector had never been organized under a proper framework of development planning. In the modern age, the clothing trend of the country is being largely westernized (Ahmed, 2020). Globalization help to bring the countries together into one single nation, foreign cultures are spreading rapidly and gradually making their presence felt in the choice of apparels among Bangladeshi consumers; so, western outfits have penetrated the Bangladeshi market a lot and has adversely affecting the local craft like Jamdani, which are being dissipated and blunted over time (Ahmed, 2020). In 2016, Jamdani got the GI status as a Bangladeshi product though this GI products are staying behind than other GI products from different countries like India, Spain and others (Matin 2019, p.1). Those countries follow some strategies to get the monopoly leadership in the international market with their GI products. Applying of some definite strategies for promotion and sale in the international market and for the protection of the product can lead Bangladesh to acquire more economic growth with the export of Jamdani, since most of the GI goods have their origin in rural areas, increased business under the GI Act will enhance the income of the Jamdani weaver community and contribute for rural development (Das, 2009, p.35). As a developing country with strong agricultural sector, GI law can be an important public policy tool for economic development and better livelihood of skilled craft practitioners (Rangnekar, 2010, p.77–80). Again, going back to the artisans, they suffer from financial constraints. Though there exist the opportunities to collect fund from microcredit, some people still take loan from Mahajon with high interest rates (Nipa 2016, p. 8). According to other studies, there exists a gap between the producers and consumers, so that the artisans are less aware about the demand and trend. Artisans are dominated by the middlemen. Many designers place orders and procure it from the production centers itself, which is why one does not see too many of it in commonplace markets (Balasubramanian, 2019). Some studies also show that, artisans in handloom industries are competing with power loom industries, where the wavers are becoming less skilled and lagged behind because of old techniques (Rahman, 2013). Some studies also show that, artisans in handloom industries are competing with power loom industries, where the wavers are becoming less skilled and lagged behind because of old techniques. Another study found that because of financial struggles, wavers are giving up their traditional job and involving in other jobs (Islam & Hossain, 2012). So, the studies show that, though Bangladesh has the world-famous cultural heritage, GI status for its Jamdani, it's not using the product at the right direction.

The key concepts covered in the previous studies, the background of Jamdani, the artisans, few challenges and opportunities as in the domestic context. Some complications are existing in the industry are the reasons of slow growth of this sector, though these complications were not identified and explained in terms of export context. No researchers and research projects were exclusively discussed about the reasons of declining of the exports of Jamdani and its diversified products in the international market. So, this study will focus on this gap and will come out with the reasons of export decline of Jamdani and Jamdani accessories in the past few years.

3. Methodology of the Study

3.1 Research Design

This research is qualitative in nature and uses Braun & Clarke (2006) thematic technique to analyze, cross & develop the themes from the gathered data and also uses Michel E. Porter's (1979) five forces of competitive position analysis to evaluate and assess the competitive strength (Dobbs, 2012) of Dhakai Jamdani Saree and its related products in the international market. Since qualitative research flexibility allows in-depths understanding of the situation (Eisenhardt, 1989) that's why it is chosen as research method. The overall study design including the selection of data collection methods and tools, sampling techniques, theme development, discussion, dissemination format and strategy has based on apparent conceptualization and proper documentation of the study objectives. With a keen eye the standard national and international level journals, reviews and articles were focused.

The approach of this research at the outset is to lucidly understand the primary purposes of the study, and after that to make clear that discussion and findings lead to appropriate, productive and evidence-based strategies formulation. This paper has tried to address all the data collected in the form of semi-structured, in-depths and KII to investigate and identify the study objectives.

3.2 Sampling Technique, Sample Selection and Data Collection Method

In order to conduct this research, the first Geographical Indications (GIs) product of Bangladesh Dhakai Jamdani Saree (Zahur M., 2018) and its relevant products industry is selected as study fields. Following that, purposive sampling techniques such as snowballing and criterion sampling, as well as key informant interviews, were employed to go forward (Vogt & Jonshon, 2011; Lindolf & Tylor, 2011; Tremblay, 1957). In order to provide comprehensive coverage (Table 3.1: presents respondents information and works area). The writers gathered the information through physical, zoom and few mobile based interviews because of covid-19 as some interviewees were not interested to give physical interview. The original objective was to collect data from 25 people among which 10 interviewees were key stakeholders and policy influencers in this field like SMEs Chairman, International Business Experts, Export Promotion Bureau Officials, Bangladesh Handloom Board Officials, Director General of Customs and Investigation Directorate, Jamdani Exporters Association elected vice-president and 20 interviewee were from the direct beneficiaries like Business Owners, Exporters, Middlemen, Weavers, Artisans, Entrepreneurs, Fashion designers, and Retailers of Dhakai Jamdani Saree and Jamdani related accessories. The epidemic prevented us from reaching to 5 of the interviewees thus total interviews number were 20.

All of the interviewees were chosen based on their actual work experience in this sector, which comprised a wide range of jobs and responsibilities. The entire interviews were taped with their permission. Furthermore, all interviews were accompanied by detailed field notes. The interviews lasted between 20 minutes to 60 minutes, and it's were transcribed for data analysis. Semi-structured interviews were conducted over a four-week period and primarily focused on the research objectives.

Table 2. List of Interviewees & Relevant Information

Participants	Workplace Designation	Organization's Name
Participants 1	Chairman	Small and Medium Enterprise Foundation (SMEs),
Participants	Director General	Customs, Intelligent and Investigation Directorate
Participants 3	Information Officer (Textiles)	Export Promotion Bureau
Participants 4	Vice President	Jamdani Exporters Association
Participants 5	Head (Planning) & Project Director Of "Golden Heritage Muslin Regained"	Bangladesh Handloom Industry
Participants 6	Chairman and International Business & Trade Expert	Dept. of International Business, University of Dhaka
Participants 7	Entrepreneurs and Customized Jamdani Saree Designer	Nandonik
Participants 8	Distributor & Exporter	Tahiya Jamdani Weaving
Participants 9	Assistant Director (Policy & Planning)	Export Promotion Bureau
Participants 10	Owner & Weaver	Ashik Jamdani
Participants 11	Entrepreneur and Designer	Meghbosona
Participants 12	Middlemen	Jakir Jamdani Ghor
Participants 13	Owner and Distributor	Sufiya Jamdani Weaving
Participants 14	Owner and Exporter	Payara Jamdani Weaving
Participants 15	Distributor & Exporter	Tanzim Enterprize
Participants 16	Owner	Palli Boutique
Participants 17	Entrepreneur and Exclusive Accessories Designer	Nandonik
Participants 18	Owner & Distributor	B.N. Trade International
Participants 19	Distributor	United Impex
Participants 20	'Mahajan'	Jamdani House

Source: Authors compilation

3.3 Data Analysis Technique

The obtained data will be analyzed, intersected, and reported using a step-by-step thematic analysis method (Braun and Clarke, 2006). The writing of this paper will be aided by mixing material from interviews and secondary sources. The following phases are: familiarization with the data, first coding, searching for themes, sub-themes, defining and identifying themes, and ultimately, producing the report. The summary of everyone's responses is written in a descriptive approach under each of those themes. The transcription of the interviews for this study resulted in over 25 pages, which were subsequently cut down to fit the needs of the study, as data reduction and management are a part of case analysis (Miles *et al.*, 2013). For ensuring trustworthiness and judging the rigour (reliability and validity) of qualitative research, we will adopt four criteria – credibility, dependability, conformability and transferability (Miles *et al.*, 2014).

4. Discussion and Findings

4.1 Analyzing the competitive business positions of Jamdani and Jamdani Accessories

Michael E. Porter's Competitive Forces model along with Braun & Clark (2006)'s thematic method is used to analysis Jamdani and Jamdani accessories competitive business position. As in shown figure 1, this study revealed that though there is some drawbacks and complexities still Jamdani and Jamdani accessories have considered as much attractive sector. Still this sector has enormous scope to growth though here need lots of investment. The sub-themes which are drawn from this study is explained below with the interview's direct opinions.

4.1.1 Threats of new entrants

- *Medium to low threats because of the necessity of special skills & crafts:* A special type of skills and crafts is necessary for producing Jamdani. Now a days the skilled and crafts weavers' numbers are reduced severely and also special types of cottons and raw materials are required which is not so available. For example, one respondent said,

"For making Dhakai jamdani saree, weavers and craftsman need special types of skills and skilled craftsmen are not available now-a-days as it is mostly carried by some weaver's families". (Respondent 3, Director, EPB Muslin regained Project)

The above statement demonstrates that entry to Jamdani making sector is medium to high now-a-days due to scarcity of specialized resources like craftsmanship and increased prices of raw materials which are precondition to produce Jamdani.

- *Brand loyalty is high as a cultural heritage:* Jamdani carries Bangladeshi cultural heritage and the citizen of Bangladesh have emotional attachment with Jamdani wherever they reside. One respondent said,

"Since Dhakai Jamdani carries our cultural heritage so especially Bangladeshi people have emotional attachment with it's wherever they reside in the world". (Respondent 4, Vice President Jamdani Exporters Association)

The above information reveals that the brand loyalty of Jamdani is high among Bangladeshi and Bengali people. So, the lack of specialized skilled people, crises of raw materials and high brand loyalty makes relatively difficult entry system into the production and distribution of Jamdani Saree and related accessories.

4.1.2 Bargaining power of suppliers

- *Small number of suppliers:* As there is small numbers & almost fixed suppliers so, the bargaining power of suppliers is certainly high. According to one respondent,

"Now, here we only some weavers are weaving Dhakai Jamdani Saree and its relevant products because our new generations are switching to several professions". (Respondent10, Owner and Weaver, Ashik Jamdani)

The above statement shows that small numbers of original Jamdani producers and suppliers holding quality bargaining power over the supply of the products. The demand of Jamdani in the domestic market is increasing in the recent time but supplier's numbers are almost fixed.

- *Uniqueness of the products:* According to the below respondent comment, we clearly understand the uniqueness of Jamdani.

“The cottons, fabrics and designs of Dhakai jamdani saree and its relevant products are unique and no others handicrafts fabrics do similar with jamdani” (Respondent 5, Information Officer (Textile), EPB).

So, the above statement explains that Jamdani is made with unique type of fabrics. According to Porters Competitive Forces model when suppliers supply unique products then they have special advantages over bargaining power of products. So, here the uniqueness of Jamdani give it suppliers’ strong bargaining power.

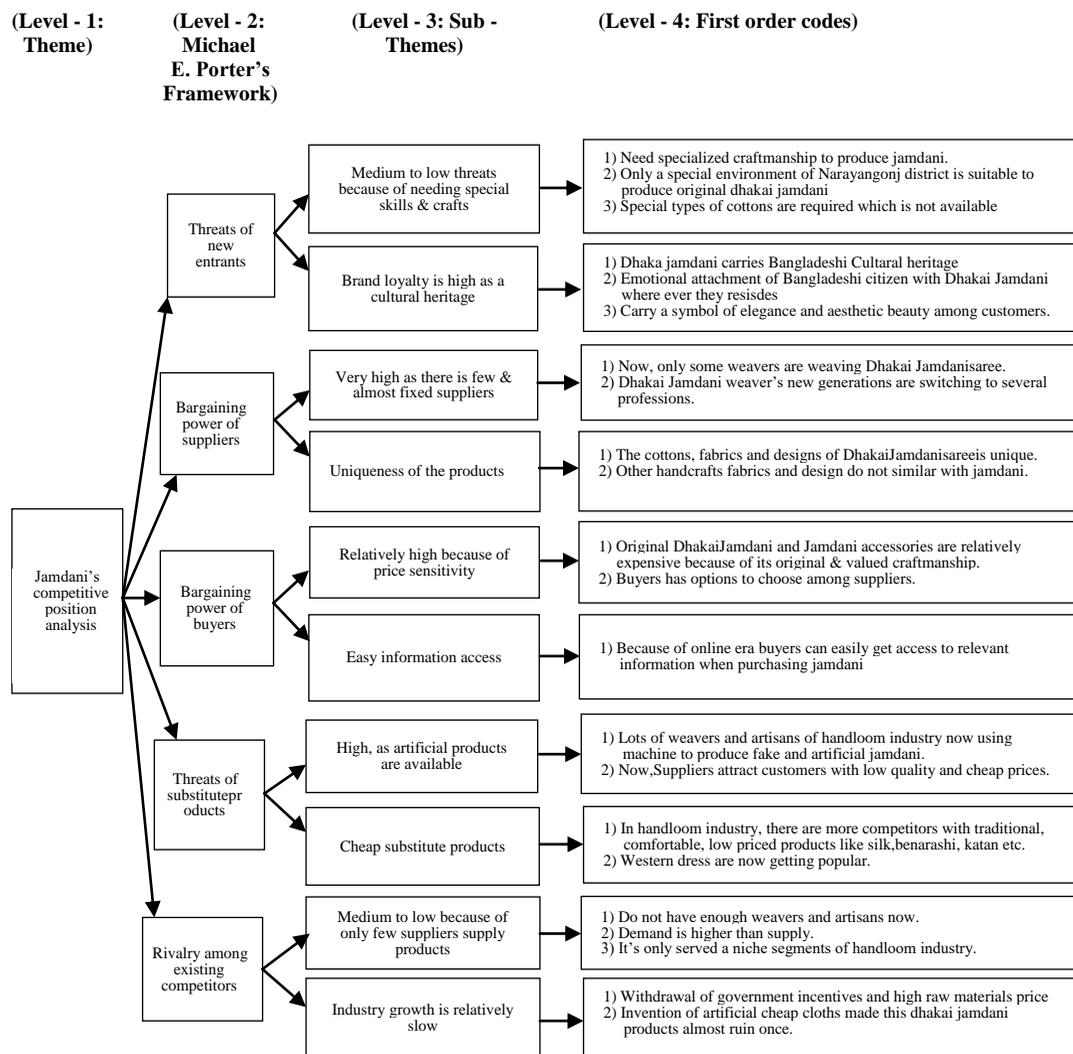


Figure 1. Competitive Position Analysis of Jamdani and Jamdani accessories (Author’s construction based on raw data analysis)

4.1.3 Bargaining power of buyers

- *Price sensitivity is high:* Jamdani is a luxurious product because of its unique craftsmanship. A respondent commented that,

“Original Dhakai Jamdani Saree and others jamdani accessories are relatively expensive because of its original & valued craftsmanship”. (Respondent 7, Entrepreneurs and Customized Jamdani Saree Designer)

Though Jamdani is an expensive product, certain group of consumers will buy Jamdani because they have the ability to buy such expensive products. And they also wish to buy such products for their social status with extra prices.

- *Easy information access:* The information availability and easy access to necessary information has made buyers bargaining power high. The below comment of a respondent illustrates it clearly.

“Because of the online era, now buyers can easily get access to relevant information when purchasing jamdani” (Respondent 11, Entrepreneur and Designer)

So, the above explanation of sub-themes has found that the buyers of Jamdani saree & Jamdani accessories have good bargaining power over the products. According to Porters Competitive Forces model high price sensitivity and easy information access give buyers competitive advantage.

4.1.4 Threats of substitute products

- *Available artificial fabrics products:* In handloom or textile industry, the threats of substitute products are increasing day by day so Jamdani are not away from it. One respondent comment reveals it clearly,

“We are now suffering because, lots of weavers and artisans of handloom industry are now using machine to produce fake and artificial jamdani with low cost thus they attract customer with low quality and cheap prices products” (Respondent 14, Owner and Exporter)

The above statement specifically reveals that in these days there is existed high threats in the Jamdani making sectors because of the presence of fake and artificial Jamdani.

- *Cheap Substitute products:* Fabric of Jamdani is not suitable for long run. Moreover its price is expensive too. As a result, only a little group of consumers buy jamdani with expensive price. So other consumers will prefer for products with same high price but with high durability than jamdani. One participant mentioned that,

“Available other sarees like katan, benarosi, Tangail, khadi is cheaper than original Dhakai jamdani.” (Respondent 17 Entrepreneur and Exclusive Accessories Designer)

So, the above discussion reveals that threats of substitute product for Dhakai Jamdani are high due to available artificial products as well as cheap substitute products.

4.1.5 Rivalry among existing competitors

- *Fewer suppliers, low rivalry:* According to the purpose of meeting consumers' demand of clothing, Jamdani is from both the handloom industry and textile industry. In handloom

industry, there are more competitors with traditional, comfortable, low – priced products but the competition among original Dhakai Jamdani weavers is little as there is huge demand of original Jamdani in the domestic market as well as in few foreign markets. One respondent said that,

“We do not have enough weavers and artisans now because of invention of artificial cheap cloths made this original Dhakai jamdani product almost ruin. Some of our weavers and their descendent changed their profession that time.” (Respondent 13, Owner and Distributor)

The above statement demonstrates that high demand and low supply encourage weavers and distributors to focus on their own business rather than engage in rivalry.

- *Low Industry Growth:* Due to several reasons, the growth of Jamdani was almost stagnant several years though now its growing in a little pace. A participant mentioned that,

“Because of withdrawal of government incentives and high raw materials price, we donot progress much over the years.” (Respondent 20, ‘Mahajan’).

The above information illustrates that lack of government incentives and increasing raw material prices working as a hinderance over the years for the progress of Jamdani sectors. So according to Porters five forces model, fewer suppliers and low industry growth paving way for low rivalry among the competitors.

The above discussion illustrates that Jamdani holding medium competitive advantages over others products among the industry because of high suppliers bargaining power, low rivalry among producers. And also, its unique fabrics, special pattern design, original crafts texture carrying a sense of elegance, cultural heritage, geographical indications, scarcity of skilled weavers and artisans have given this sector a specialized strength though at the same time have some weaknesses because of the threats of low quality cheap fabricated products as well high buyers bargaining power due to high products prices and available alternatives.

4.2 Thematic analysis of investigating the causes of export decline of Jamdani and Jamdani accessories in the recent years

This section illustrates the overall findings relating to the causes of recent years export decline of Jamdani and Jamdani accessories. Figure 2 shows that thematic analysis has identified eight reasons behind the recent export declines of Jamdani sarees and Jamdani accessories like bags, artworks, tie, designers dress, ornaments, and pillow and cushion cover etc. while Table3 only shows some direct sample quotes from the stakeholders and participants.

4.2.1 Unaware about buyer’s tastes

The lengthy processing time of production and the use of old, backdated instruments to produce only few traditional design jamdani. From the very beginning to present time, jamdani is produced in Bangladesh in the same process it was produced before. The type of fabric, sensitivity is as same as it was 20 or 30 or 40 years before. No noticeable innovation and new design are lunched here to match the taste and preference of modern age customers. Total 12 participants among 20 perceived the same problem. For example, one participant commented that,

“The taste and preferences of customers are changing frequently now-a-days with fast changing fashion of the world. Products diversification is must be in order to survive in global market”. (Respondent 1, Chairman, SME Foundation)

From the above statement it is clear that unaware about buyers taste and producing product according to customized demand, low product diversification is one of the reasons of decline Jamdani export in the recent days. Absence of research of the existing fabrics and absence of innovating new types of fabrics have led to decreased demand of jamdani to new customers and also to the old customers.

4.2.2 Coordination gap among various players

There exist huge coordination gap among government players as well as private players in Handloom industry. In this study total 15 participants talked in a similar vein in this regard. The below commentator response will clearly explain this problem,

“Though government provides various incentives like lending small amounts with no or lower rate interest but the illiterate weavers are sometimes unaware about it thus the middlemen and Mahajan’ exploit these opportunities in the name of weavers and artisans” (Respondent 7, Entrepreneurs and Customized Jamdani Saree Designer)

Likewise, the owners and weavers sometimes don’t know the international trade fairs news and they have little scope to participate in the international trade fairs. Also, the middlemen, ‘Mahajan’, and distributors deceived the weavers by providing very low wages for their works.

4.2.3 Complex export procedures

Formal export procedures are very complex to understand by less educated businessmen and exporters. For example, 4% local tax imposed by Indian government on export of jamdani. Because of complex export procedures the exporters do unethical activities like smuggling, selling copied products both in domestic and foreign markets. Total 13 participants among 20 have said about the same problems. Besides this there are also some complexities which will be clear from the below participant comment,

“In order to export formally in Indian market, we need colors test certificate and we have to arrange color test process in Banaras, India to collect this certificate. In Bangladesh we don’t have any Dhakaijamdani color test arrangements.” (Respondent 4, Vice President, Jamdani Exporters Association)

The above statement reveals the complexities of exports of Jamdani and Jamdani accessories like arranging and collection of color test certificate from India which is one of the major export markets for Bangladeshi Jamdani.

4.2.4 Lack of cash incentives

From the literature part the study found that Jamdani export was growing when government provided cash incentives but after the withdrawal of cash incentives export has fallen tremendously as it has now no record at Export Promotion Bureau’s records after 2010-2011. The study also found that withdrawal of cash incentives has impact on export declines of Jamdani though there are valid reasons of export declines. Total 11 participants from 20 perceived the same problem. For example, one participant said that,

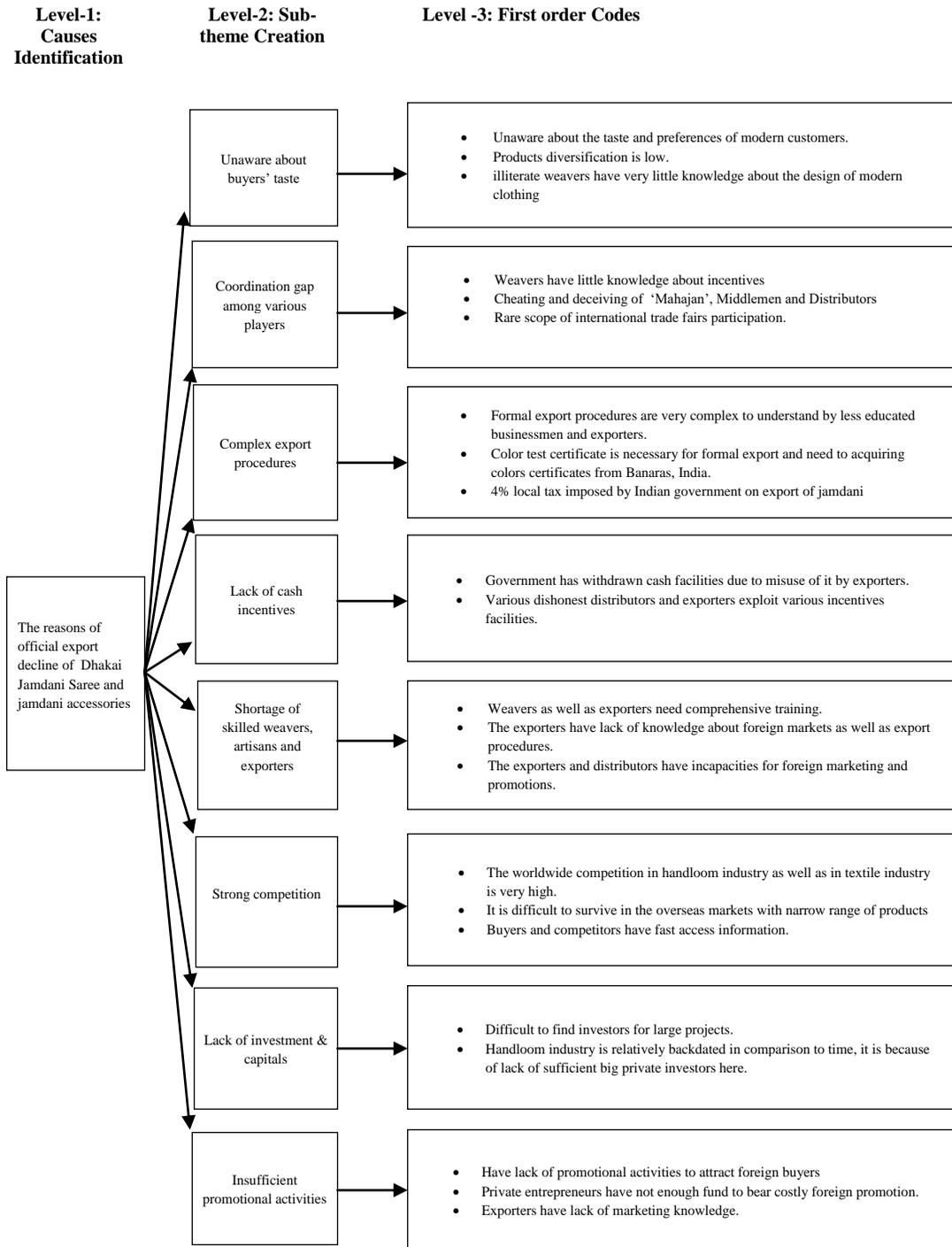


Figure 2. Analytical coding process to identify causes of decline of Jamdani exports based on raw data analysis.

Table 3. Key Themes and Sub-themes Relating to Export decline of Dhakai Jamdani and Jamdani Accessories

Problems	Sub-themes	Participants Opinions	Others Participants Perception
The reasons of official export decline of Dhakai Jamdani Saree and Jamdani accessories	Unaware about buyers' taste	"The taste and preferences of customers are changing frequently now-a-days with fast changing fashion of the world. Products diversification is must be in order to survive in global market". (Respondent 1, Chairman, SME Foundation)	Participants 3,6,7,8,9,11, 13,14,15,19 also perceived the same problems
		Most of our weavers are illiterate and they have very little knowledge about the taste of modern clothing and accessories thus they are rigid to produce only few patterns design" (Respondent 4, Vice President, Jamdani Exporters Association)	
	Coordination gap among various players	"Though government provides various incentives like lending small amounts with no or lower rate interest but the illiterate weavers are sometimes unaware about it thus the middlemen/'Mahajan' exploit these opportunities in the name of weavers and artisans" (Respondent 7, Entrepreneurs and Customized Jamdani Saree Designer)	Participants 1,2,3,4,6,8,11, 13,14,15,16,19, 20 also perceived the same problems
		"Though government arranging trade fairs in many countries, we weavers have small opportunities to participate in those fairs. Most of the opportunities are captured by Middleman, Mahajans and Distributors thus we are depriving to know the taste and demand of international market". (Respondent 10, Owner & Weaver)	
	Complex export procedures	"Formal export procedures are very complex to understand for us, the owners of jamdani handlooms. If government initiate less complicated process for jamdani and jamdani accessories export, it will be helpful for us." (Respondent 11, Entrepreneur and Designer)	Participants 3,4,6,8,11, 13,14,15,18, 16,19, also perceived the same problems
		The formal export procedures of any items maintain many documentations, rules and regulations. It sometimes discourages the small volume exporters to adopt unfair means like black marketing in international market" (Respondent2, DG, Customs, Intelligent and Investigation Directorate)	
		In order to export formally in Indian market, we need colors test certificate and we have to arrange color test process in Banaras, India to collect this certificate. In Bangladesh we don't have any Dhakai jamdani color test arrangements." (Respondent 4, Vice President, Jamdani Exporters Association)	
	Lack of cash incentives	Because of misuses of cash incentives opportunities by exporters of Jamdani like show false documents of exports to avail cash incentives facilities government has withdrawn these facilities." (Respondent 2, DG, Customs, Intelligence and Investigation Directorate)	Participants 4,7,8,12, 11,14,18, 16,19, also perceived the same problems
		When we got cash incentives from government for exporting jamdani,then official export volume was high because exporters were encouraged to export more and identified new buyers for exports." (Respondent 13, Distributor and Exporter)	
	Shortage of	"The weavers as well as exporters need comprehensive	Participants

	skilled weavers, artisans and exporters	training. We have shortage of skilled human power in this sector” (Respondent 1, Chairman, SME Foundation)	2,4,5,6,7,8,12, 13,14,15,18, 16,20 also perceived the same problems
		“The exporters have lack of knowledge about foreign markets as well as export procedures and they need training in order to understand the details procedures of exports.” (Respondent 3, Director, EPB Muslin regained Project)	
	Low product diversification	“The worldwide competition in handloom industry as well as in textile industry is very high. It is difficult to survive in the overseas markets with narrow range of products”. (Respondent 9, Assistant Director, EPB)	Participants 1,2,3,4,5,7,8,12, 13,14,16,17 also perceived the same problems
		“In the era of fastest taste and preferences changes and also, available access to data expose the exporters to face the challenge of intense competition in the markets”. (Respondent 6, International Trade Expert)	
	Lack of investment & capitals	“Though low capital is needed to start up jamdani business, here needs little high investment when time to exports and founding investor is challenging specially for entrepreneurs like us”. (Respondent 17, Entrepreneur and Exclusive Accessories Designer)	Participants 4,5,6,7,8,12, 13,14,16,20 also perceived the same problems
		“It is true that our handloom industry is relatively backdated in comparison to time, it is because of lack of sufficient big private investors here. Here need big institutional investors to boost it capacities”. (Respondent 3, Project Director Muslin Regained, BHI)	
	Insufficient promotional activities	“We have lack of promotional activities to attract foreign buyers. The lacking of promotional activities are from government side as well as from private sides” (Respondent 1, SMEs Foundation Chairman)	Participants 2,3,4,5,6,8,12,11 13,14,17 also perceived the same problems
		If we want to capture foreign buyers, we need to run promotional activities in the international market. Since it is costly for individual entrepreneur or businessmen that why here remain a huge gap.” (Respondent 7, Entrepreneur & Customized Jamdani Accessories Designer)	

Source: Author Derived

“Because of misuses of cash incentives opportunities by exporters of Jamdani, like showing false documents of exports to avail cash incentives facilities, government has withdrawn these facilities.” (Respondent2, DG, Customs, Intelligence and Investigation Directorate)

The above information reveals that misuse of cash incentive facilities by Jamdani exporters at those time guided the government to withdraw those facilities and could not introduce these facilities again since then.

4.2.5 Shortage of skilled weavers, artisans and exporters

The manpower used in the Jamdani sector have the same knowledge and skill from the ancient time. This old knowledge, skill, techniques do not get match with present competitive world. As a result, this does not go with the need and demand of modern consumers’ purpose. The maximum illiterate weaver, artisans, owners do not have updated market knowledge, idea, risk factors. If anything happens to the sector and the sector destroys fully, they will move to another sector but they will not

think for the development of the sector. Total 15 participants perceived the same problem. One major stakeholder said that,

“The weavers as well as exporters need comprehensive training. We have shortage of skilled human power in this sector” (Respondent1, Chairman, SME Foundation)

So, the above statement demonstrates that shortage of skilled weavers, artisans and exporters are critical factor for exports decline.

4.2.6 Low product diversification

Absences of modern technology in the production process has made it difficult for the weavers to shorten the production time along with produced diversified products. As a result, cost is very high and the products price is high also. And high price of a product generally discourages common people to purchase a product. With this price sensitivity and narrow product diversification, competing with foreign competitors is difficult in this globalized era. In this study 14 participant thought about this same problem. One participant said that,

“The worldwide competition in handloom industry as well as in textile industry is very high. It is difficult to survive in the overseas markets with narrow range of products”.
(Respondent 9, Assistant Director, EPB)

So, the above statement demonstrates that the taste and preferences of modern consumers are changing frequently and it is difficult to fulfill their demand with low product diversification. Thus, it is working behind export falling of Jamdani and Jamdani accessories from Bangladesh.

4.2.7 Lack of investment & capitals

Collection of raw materials, colors, yarns, chemicals and meeting present problems this sector requires huge capitals, which the weavers or the business persons do not have. The cost of yarns and dyeing procedures is increasing too fast in these days. Again, they face difficulties to collect loan from financial institutions. Out of 20 participants 12 have the same perception in this regard. For example, one participant mentioned that,

“It is true that our handloom industry is relatively backdated in comparison to time, it is because of lack of sufficient big private investors here. Here need big institutional investors to boost it capacities”. (Respondent 3, Project Director Muslin Regaind, BHI)

The above statement demonstrates that capital shortage, poor investment interest of private investors and lack of big institutional investors also reasons for slow growth of this sector.

4.2.8 Insufficient promotional activities

When any particular industry or sector gets difficulties for survival in the market, government or related authorities should pay attention to help the sector to survive in the competitive market. The Jamdani sector was suffering for several problems but there was less attention given by related authorities which made the situation worsen. 13 out of 20 participants perceived the same problems. For example, one participant said that,

“We have lack of promotional activities to attract foreign buyers. The lacking of promotional activities are from government side as well as from private sides”.

(Respondent 1, SMEs Foundation Chairman)

The above information reveals that lack of promotional activities from the side of government as well as producers and exporters are working as major problems behind the export decline of Jamdani and Jamdani accessories.

So, from the above discussion the has found the major reasons of export decline of Jamdani saree and Jamdani accessories are coordination gap among various players, unaware about buyer's tastes, complex export procedures, lack of cash incentives, shortage of skilled weavers, artisans and exporters, low product diversification, lack of investment & capitals and also insufficient promotional activities.

Conclusion

This study investigated the key research question, (1) what is the competitive business position of Dhakai Jamdani and Jamdani made accessories in domestic as well as in international market? and also (2) what are the reasons of export decline of Jamdani and Jamdani made accessories in the recent years? Well recognized theoretical model and method were used to identify and investigate the research objectives. With compliance to the first research questions findings illustrate that Dhakai Jamdani holding a medium competitive advantages over others products among the industry because of its unique fabrics, special pattern design, original crafts texture carrying a sense of elegance, cultural heritage, geographical indications, scarcity of skilled weavers and artisans though at the same time have some weaknesses because of the threats of low quality cheap fabricated products as well high buyers bargaining power due to high products prices and available alternatives.

And the second research question, the findings identified some causes like coordination gap among various players, unaware about buyer's tastes, complex export procedures, lack of cash incentives, shortage of skilled weavers, artisans and exporters, low product diversification, lack of investment & capitals and also insufficient promotional activities are working behind the export decline of Jamdani and Jamdani made accessories from Bangladesh in the past few years. This paper has few limitations that allow further research like strategies formulation to overcome the identified problems from this research. Though the product Jamdani holds Geographical Indications status, it is not promoted and sold in global market as like other GI products from other countries. As a part of increasing its export volume Bangladesh government is trying to identify the potential export sectors in the past few years. The practical implication of this paper is huge for Bangladesh government, textile and handloom industry stakeholders, exporters and fashion designers because this paper has worked on a traditional but historically elegant sector of Bangladesh which has enormous potential for engaging extensive level export activities. So, it is expected that the outcome of this research will contribute to the promotion of Dhakai Jamdani and Jamdani accessories in international market and thus add value to Bangladesh export basket.

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Appendix

Research questionnaire

Name of the Research Topic: Analyzing the competitive business position of Dhakai Jamdani & Jamdani made accessories and investigating the reasons of export decline of Dhakai Jamdani Saree and jamdani accessories in the recent years”

General instructions for KII interview: Introduction, confidentiality, research consent, and permission for recording.

This study plans to identify the competitive business position of Dhakai jamdani saree and jamdani made accessories of Bangladesh in domestic as well as in international markets and

also want to investigate the specific reasons of export decline of Dhakai jamdani saree and jamdani accessories in the recent years in spite of it is the first GI product of Bangladesh

I would like to invite you to feel comfortable to express yourself and to share your thoughts and experiences during this discussion. At the same time, I would also like to ask that we all be respectful of one another and that what we share remains in this interview. Of course, if you are not comfortable sharing anything, you do not have to, and that is also alright. Recording is being made of the discussion session and we will be taking key notes so we remember what we've discussed today, however, we will not share your individual responses to anyone, only anonymous quotes and the overall results will be included in reports. Your name will not appear anywhere to ensure that your responses cannot be linked to you. Our discussion is likely to take between 30 to 60 minutes. While we hope you can stay throughout the discussion, it is your choice to stay or leave at any point. In addition, it is up to you which questions you do or do not answer. Do you have any questions that you would like to discuss before we begin?"

..... **Name and signature of respondent.**

Date...../..... / 2021

- YES (if the answer is YES, continue the interview)
- NO (if the answer is NO, stop taking the interview) (Note to the Facilitator: Please explain what they are giving consent to - write it out and read it out to each person so they are clear.)

Discussion Starting Time:

Discussion Closing Time:

General background information of the participants:

1. Name of the Organization/Factory:
2. Address:
3. May I know your role and responsibility within the organization, years of experience, and areas of expertise of yours?

Interview protocols:

Research Objective 1 related questions: (The competitive business position of Dhakai jamdani saree and jamdani made accessories of Bangladesh in domestic as well as in international markets).

- 1) What is the competitive position of jamdani saree and its related products as in domestic market?
- 2) What is the competitive position of jamdani saree and its related products as international market?
- 3) What is the current growth status of Dhakai jamdani Sector?
- 4) How much threats substitute products pose in the growth Dhakai jamdani sector?
- 5) How about suppliers bargaining power here?
- 6) How about buyers bargaining power here?
- 7) What is the intensity of rivalry among suppliers?
- 8) Do you think this sector is promising as diversified exports product?

Research Objective 2 related questions: (The specific reasons of export decline of Dhakai jamdani saree and jamdani accessories in the recent years in spite of it is the first GI product of Bangladesh.)

- 9) According to your opinion what are the reasons of export decline of Jamdani Saree and its related products in the recent years?
- 10) What type of challenges are you facing while operating in the international market?
- 11) Do you think jamdani has a good future as export products if Government of Bangladesh take action to focus on this exports product?
- 12) Mention it specifically with your perceived knowledge what problems are you facing while exporting these products?
- 13) Mention your experience while you are working here with these types of products/dealing with these issues

Any comments:
