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CONTENTS

Sr. No.	TITLE & NAME OF THE AUTHOR (S)	Page No.
1.	THE RELATIONSHIP BETWEEN CAPITAL AND OWNERSHIP STRUCTURES WITH THE CREATED SHAREHOLDER VALUE IN TEHRAN STOCK EXCHANGE <i>MOHAMADREZA ABDOLI, MOHAMADREZA SHORVARZI & SYED NAJIBALLAH SHANAEI</i>	1
2.	IMPACT OF GOOD GOVERNANCE ON THE CORPORATE GOVERNANCE IN BANGLADESH <i>MD. ZAHIR UDDIN ARAF, MD. OMAR FARUQUE & UDAYSHANKAR SARKAR</i>	6
3.	DETERMINANTS OF JOB PERFORMANCE OF ADMINISTRATIVE STAFF IN LADOKE AKINTOLA UNIVERSITY OF TECHNOLOGY, OGBOMOSO, NIGERIA <i>AKANBI F. K. & OJOKUKU R. M.</i>	9
4.	THE NEXUS BETWEEN ORGANIZATIONAL CULTURE AND TOP MANAGEMENT SUPPORT AS AN INFLUENCE TO THE ADOPTION OF INFORMATION AND COMMUNICATION TECHNOLOGY (ICT) IN THE RWANDAN COMMERCIAL BANKS <i>MACHOGU MORONGE ABIUD & LYNET OKIKO</i>	14
5.	THE ROLE OF CORPORATE REPUTATION ON TRAVEL AND LEISURE COMPANIES PERFORMANCE IN MALAYSIA <i>SAHAR E-VAHDATI</i>	20
6.	HR AUDIT: AN EVALUATION OF HR PRACTICES <i>MARIAM AHMED</i>	23
7.	BENEFITS AND CHALLENGES OF CONVERGENCE TO INTERNATIONAL FINANCIAL REPORTING STANDARDS BY PUBLIC ACCOUNTABILITY COMPANIES IN NIGERIA <i>ISHAQ ALHAJI SAMAILA</i>	29
8.	FACTORS INFLUENCING EMPLOYEE ENGAGEMENT IN AN ENTERTAINMENT INDUSTRY <i>A. ANGELINE EMMEMA, N. AJAN & C. KARTHIKEYAN</i>	35
9.	AN INSIGHT INTO XBRL: INDIAN PERSPECTIVE <i>DR. SUMIT GARG & RITIKA AGGARWAL</i>	43
10.	EMPLOYEES' SATISFACTION AND INDUSTRIAL RELATIONS – A STUDY OF SELECTED INDUSTRIAL UNITS OF AHMEDABAD AND ANAND DISTRICTS <i>DR. VIJAYSINH M. VANAR</i>	48
11.	AN EMPIRICAL STUDY ON TALENT MANAGEMENT – AN OUTMOST OPPORTUNITY FOR ORGANIZATION'S SUCCESS <i>NANDINI M. DESHPANDE</i>	61
12.	A STUDY OF HUMAN RESOURCES RELATED CONFLICTS IN SOFTWARE INDUSTRIES IN HYDERABAD <i>RAMAKRISHNA SASTRY GHATTY & DR. V. MADHUSUDHAN PRASAD</i>	65
13.	CAPITAL STRUCTURE (DEBT-EQUITY) OF INDIAN PHARMACEUTICAL INDUSTRY – A STUDY <i>K. PADMINI & C. SIVARAMI REDDY</i>	70
14.	GAINING LEVERAGE FROM SUPPLY CHAIN TO MAXIMIZE PROFITS <i>DR. MADHU JASOLA & SHIVANI KAPOOR</i>	74
15.	BUSINESS CYCLE STAGES AND HUMAN CAPITAL COST – AN EMPIRICAL STUDY OF SERVICE SECTOR COMPANIES IN INDIA <i>DR. YAMINI KARMARKAR & PRACHI JAIN</i>	79
16.	A COMPARATIVE STUDY ON CUSTOMER PREFERENCE ON MOBILE COMMUNICATION WITH REFERENCE TO THE SERVICE PROVIDED BY PRIVATE (AIRTEL) AND PUBLIC (BSNL) SECTOR IN COIMBATORE DISTRICT <i>DR. G.SAKTHIVEL</i>	85
17.	THE BRAND IMAGE & SATISFACTION LEVEL OF DEALERS AND SURROGATE BUYERS OF AMBUJA CEMENT LIMITED IN SAURASHTRA REGION <i>UTKARSH. H. TRIVEDI & JIGNESH. B. TOGADIYA</i>	88
18.	SMALL PACKAGING- MAKING THINGS AFFORDABLE (A STUDY OF RURAL CONSUMERS) <i>RANJEET KAUR & AMANDEEP KAUR</i>	100
19.	A REVIEW OF VIRTUAL LEARNING METHODOLOGY IN THE DEVELOPMENT OF SALES WORKFORCE <i>KETAN KANAUIA & L. R. K. KRISHNAN</i>	106
20.	CLASSIFICATION OF INVESTORS' IN INDIAN SECURITIES MARKET WITH REFERENCE TO TAMILNADU – A DISCRIMINANT ANALYSIS <i>DR. V. DHEENADHAYALAN</i>	115
21.	MARKETING IN ORGANIZED RETAIL ENVIRONMENT: A RETAILERS PERSPECTIVE <i>VASUNDRA</i>	123
22.	A STUDY ON EFFECT OF CSR INITIATIVES OF AUTOMOTIVE COMPANIES ON CONSUMER BUYING BEHAVIOR <i>SHILKI BHATIA</i>	126
23.	EMPLOYEES PERCEPTION ON DAY – SHIFT V/S NIGHT - SHIFT JOBS (WITH SPECIAL REFERENCE TO BPO SECTORS IN HYDERABAD) <i>ANITA D'SOUZA</i>	133
24.	AN OVERVIEW OF THE CHALLENGES FACED BY ITES /BPO EMPLOYEES IN INDIA AND THE NEED FOR NATIONAL LEGISLATURE TO PROTECT EMPLOYEE RIGHTS OF THIS SECTOR <i>ANJALI PASHANKAR</i>	139
25.	INSURANCE BUSINESS IN INDIA - AN OVERVIEW <i>VENKATESH BABU S</i>	143
26.	LEADERSHIP STYLES IN DYEING AND PRINTING INDUSTRY (WITH REFERENCE TO JETPUR CITY OF RAJKOT DISTRICT) <i>ANKITA DHOLARIYA</i>	147
27.	INTEGRATION OF INDIAN STOCK MARKET WITH ASIAN AND WESTERN MARKETS <i>RAKESH KUMAR</i>	153
28.	EFFECT OF SALES PROMOTION ACTIVITIES ADOPTED BY MAHINDRA AUTOMOBILES ON RURAL MARKET OF PUNJAB <i>PRANAV RANJAN & RAZIA SEHDEV</i>	160
29.	IDENTIFICATION OF KEY STRATEGIC FACTORS IN APPAREL SOURCING DECISIONS BY INDIAN RETAILERS; A CASE BASED STUDY <i>PARAGI SHAH</i>	165
30.	GROWTH AND PROSPECTS OF INDIAN MUTUAL FUND INDUSTRY - A REVIEW <i>B. USHA REKHA</i>	171
	REQUEST FOR FEEDBACK	179

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IDENTIFICATION OF KEY STRATEGIC FACTORS IN APPAREL SOURCING DECISIONS BY INDIAN RETAILERS; A CASE BASED STUDY

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ABSTRACT

This research paper tries to understand key strategic factors in apparel sourcing decisions. To achieve this objective, case study of three prominent Indian retailers having different apparel sourcing practices have been developed. The companies involved in this study are either sourcing through complete in-house manufacturing or combination of partial sourcing from outside and partial in-house, or complete outsourcing with outright purchasing of garments. These case studies are exploratory in nature and are based on combination of interviews and discussions with company staff involved in sourcing and supply chain management. Semi-structured interviews were carried out with senior and middle management employees from various departments like design, production, procurement, quality and commercial. At the end of the study, after considering secondary as well as primary data, an exhaustive chart has been created showing important parameters considered by Indian retailers while taking sourcing decisions. This paper aims to contribute to the theory and knowledge of supply chain management practitioners and industry analysts.

KEYWORDS

Men's apparel Industry, sourcing practices, case studies, India.

INTRODUCTION

In the recent past, India has emerged as the most diversified and promising destination for apparel retailers who seek high quality garments with greater flexibility and speed¹. India comes after Brazil and China in apparel consumption and clothing imports/exports (AT Kearney, 15th June, 2009). Not only off shore but even the domestic demand in India has risen which is evident from the fact that out of \$49-billion textile and apparel industry, the domestic industry accounts for \$30 billion². The Indian apparel industry is comprised of a various types of retailers with distinct characteristics and varying needs in terms of supplier performance. Whether it is on shore or off shore, apparel industry has some inbuilt uncertainties which makes the sourcing activity highly volatile and complex. Apparel retailers source their garments through different supply channels. Some retailers have their own manufacturing facilities while some retailers' source from manufacturing suppliers or via intermediaries. End consumers' choice and garment offerings are the main drivers for the firms in selecting the supply channels and supply markets. Retailers adapt sourcing strategies according to the volatility of demand, competition, product life cycles, shares of low-volume garments, and demand for standardized garments and so on. The efficient and effective sourcing is the key to higher profitability. However, there had been limited researches investigating on what sourcing strategies are used by apparel companies in India and what advantages and risks a company runs while choosing a particular strategy. Moreover, the effects of the strategy and difficulties apparel companies encounter with its implementation have not been researched as much as other business industries. Moreover, there is a constant change in the offerings; operation flow keeps changing every minute, every hour and every season. Hence, it is very important to understand the dynamics of sourcing markets and channels in line with firm characteristics to achieve successful sourcing.

REVIEW OF LITERATURE

Sourcing in Apparel industry has unique challenges as this industry faces a lot of demand uncertainty depending on trends like fashion and consumer preferences. A study conducted by Fraering and Prasad (1999) considered two key strategic decisions for sourcing. 1.) Selection of supply market and 2.) Selection of supply channels. The first dimension of supply market primarily focuses on the place from where the sourcing is done. It deals with the nation-specific resources. Low cost markets have different trade-offs of quality-price levels due to their unskilled cheap labor, cultural and geographical distances and so on. Putting this concept in Indian perspective, there are many pockets in India where the garment manufacturing is done and every pocket has their own specialty. The specialty may lie in cheaper cost or specific product manufacturing and also the culture and environment that give better results in terms of delivery and transparency. So for any new entrant in this industry, it becomes essential to understand the favorable and unfavorable factors of each supply market and channel. Levy (1995), distinguished between location-specific factors and relational factors in sourcing strategies. The location specific factors are largely related to the location of manufacturing facilities, whereas the relational factors concern the relationships between different vendors, intermediaries and other involved actors. Bolisani and Scarso (1996), concentrated on employment of global manufacturing strategies by Italian apparel industry with a special focus on low-cost sourcing and handling hidden costs that are often neglected. In addition, Lowson (2001, 2003) focused on how supply market choices affect apparel firms' performance in terms of cost, quality, flexibility, innovation and design.

The choice among various supply channels, involves assessing firms' strategic choices in garment manufacturing. It starts with whether to make-or-buy decision, internal manufacturing or sourcing from external suppliers and the right mix of all the channels for right mix of product and prices (Cáñez et al., 2000; Fill and Visser, 2000). Bolisani and Scarso (1996) in their study discussed about internally controlled manufacturing facilities and external sources. According to his study direct investments and joint ventures are two types of internally controlled manufacturing operations, and sourcing from external suppliers and intermediaries are the external sources.

From the above literature, three main strategic sourcing options can be drawn, concerning the choice among supply channels i.e. internal sourcing (own manufacturing as partial or whole ownership), direct external sourcing and indirect external sourcing. In addition to the above (Forza and Vinelli, 2000; Perry and Sohal, 2000; Christopher and Towill, 2002; Jin, 2004) studied the concept of double sourcing in which retail firm on one hand source the product from low-cost distant markets and at the same time the same product is sourced from quick but expensive supplier for responsiveness.

Fraering and Prasad, (1999) made a very prime contribution by throwing light on the importance of firm characteristics while selecting sourcing strategy. It was observed that firm characteristics can be broadly divided into two elements. 1.) Product issues and 2.) Organization issues. The product issues are largely related to company's requirements of price, quality, volume of the product, innovation, customization in the products, and volatility of the demand and so on. Product issues and their impact on sourcing strategies are frequently addressed in various supply chain literature. Bruce et al. (2004) focused on the firm's supply chain requirements, whereas Trent and Monczka (2003) studied firm's need for more innovation in their products rather than another 'me too' product. Bolisani and Scarso (1996) focused on the firm's quality standards policy and so their requirements of closely working with the suppliers whether internal or external or

¹ The Global Apparel Value Chain, Trade and the Crisis, Challenges and Opportunities for Developing Countries: The World Bank Development Research Group, Trade and Integration Team, April 2010

² India top retail destination for investors: AT Kearney, 15th June, 2009

collaborations. Cho and Kang (2001) brought out the suitability of global markets when there are higher volumes. In addition, organizational issues are often said to affect firms' choice among various sourcing strategies. Trent and Monczka (2003) as well as Cho and Kang (2001), argued that the firm size and the degree of sophistication of various operations will require the suppliers and collaborators to have equivalent support system to adjust with them. Bolisani and Scarso (1996) were of the opinion that when the company is looking at low cost sourcing strategy then sometimes small firms have stronger incentives than large ones. Bruce and Moger (1999) even suggested that firm's experience in sourcing is also one of the major influential factors in deciding on sourcing strategy. It was also suggested by Tyler et al. (2006) that firm's degree of involvement with end consumers also has an impact on the sourcing strategy.

Supplier performance is also focused as one of the key parameters while deciding on sourcing strategy. Various studies have identified dimensions of supplier performance to be considered while sourcing. Summing up the various dimensions covered in various studies, they are broadly divided into five dimensions. These are delivery, flexibility, cost, quality and reliability. Delivery primarily deals with order lead times, geographic locations and freights and trade restrictions related to geographic locations. Flexibility is more related to internal aspects of suppliers i.e. transparency, capacity, customization, inventory facilities and negotiability. Cost parameter takes into consideration the supplier's selling price and how far that is suitable to the retail firm. It also considers the payment terms and conditions. Garment stitching and material quality, on-time deliveries Customer services, improvement plans of the supplier and also any certification with supplier indicates quality performance of the supplier. Trust and reliability is one of the important criteria while selecting vendors. Personal attention, feeling of trust and policies of the vendor are the parameters which are considered while selecting a vendor (Cho and Kang, 2001; Warburton and Stratton, 2002; Teng and Jaramillo, 2005). The softer issues like buyer and supplier relations, transparency with the supplier, communication and flexibility with the suppliers have also been focused by (Bruce et al., 2004; Tyler et al., 2006).

NEED FOR THE STUDY

In the literature study, it was observed that a little study is done on sourcing practices and key decision factors, with respect to Indian scenario. Moreover, India has a huge domestic market for apparels, as well as it is a growing source of textile garments for International players. Hence, in a cut throat competition, apparel retail companies are focusing on sourcing to bring the difference on their retail floor either through cost, quality or through variety and responsiveness. Thus, it is very essential to understand the key factors which influence the sourcing decision of the company. This paper tries to bring out the key strategic factors considered by Indian apparel retailers focusing on men's shirting garment, while taking a sourcing decision.

OBJECTIVES OF THE STUDY

To understand various sourcing practices and draw down factors considered by Indian retailers while sourcing men's garments for Indian markets.

METHODOLOGY

For better understanding and exploring facts related to sourcing strategies of various Indian retailers, this study has developed case studies of three prominent retailers of India. These retailers were cautiously selected to understand various functions involved with various strategic options. Out of these three, one retailer followed complete in-house manufacturing for the brand; the second retailer had combination strategy of having partial sourcing done from outside and partial in-house, and the third retailer completely outsourced the garments with outright purchasing of garments from various vendors. These case studies are exploratory in nature and developed after taking combination of interviews and discussions with company staff involved in sourcing and supply chain management. Semi-structured interviews were carried out with senior and middle management employees from various departments like design, production, procurement, quality and commercial. In the present study, the names of these companies have been disguised as requested by the companies.

COMPANY 1 (FJ)

BACKGROUND

The FJ is a private limited company established in 1982 in Gujarat and was subsequently converted into a public limited company in 1988. The company is engaged in manufacturing product groups like denim, high value shirting and attires. The company has its own manufacturing capacity for textiles as well as garments. It offers 10.5 million meters per annum of denim fabrics in 100% cotton for jeans, shorts and jackets, casual shirts, and kids wear. The company has two in house brands named FJ and IC. FJ is a ready-made menswear garment brand. Whereas ready to stitch cut pieces are sold under the brand name of IC. The company exports its fabrics to more than 45 countries. It is the first textile company to adopt and get certified for integrated quality and environmental management system ISO 9001:2000 and ISO 14001:2004.

COMPANY PHILOSOPHY

'FJ is a 100% Cotton Menswear Readymade Garments brand. The group considers its apparel retail venture, as their way of being near to the market with its eyes & ears fixed on getting the feel of the latest needs of the customer. The brand emphasizes on putting the best inputs in terms of fabric, styling and stitching of garments avoiding all the wasteful expenses and passing on the resultant benefits to the customer. The shirts under this brand are considered as value for money. The above philosophy is followed in the sourcing activities also.

SOURCING OF FJ

All FJ garments are made from high quality fabrics produced by the group company only. They are styled and stitched at world class garment manufacturing facilities owned by the Group, under the strictest quality assurance parameters. However, the company manager believes that, strict quality parameters have been one of the prime contributors for their lower production output. The manufacturing unit is catering to other national international brands as well, which helps them to compensate for the lost productivity. FJ garments are available at 15 exclusive outlets owned by the company, across Gujarat. So far they have not been successful in going across India. Hence, due to small number of stores, the merchandize quantity required is also limited. At every stage the company compromises with their MOQ (minimum order quantity). Such as; in case of fabric production the MOQ is 1000 mtrs, and the fabric quantity required by FJ brand was 400 mtrs and so rest 600 mtrs were produced extra which is used by IC brand in their ready to stitch fabric packs. And at the garment production front, the efficiency is compromised due to shorter runs, which results into 1.5 times higher cost of garment manufacturing as compare to industry. Thus, on the market front the brand is sold as a value product and at the sourcing front, in spite of in-house fabric and garmenting facilities the brand is not able to shrink costs and expand the profits.

The future plans are coupled with cycle of challenges. Brand FJ is positioned as a value brand but on the other hand sourcing cost is steady at higher price due to high quality standards. The pace of opening up of retail outlets is very slow which has affected MOQs of Brand FJ. This has resulted into sharing of fabric sourcing with brand IC. The sharing of fabric sourcing has risk of one brand affected due to slow down in the other brand. Brand FJ has not witnessed growth of more than 10- 12% since its launch, very little growth is seen in volumes of FJ sales.

COMPANY – 2 (MG)

ABOUT MG

MG is one of the largest value retail company of India's largest integrated textile manufacturer and retailer of branded apparels. MG is present in India since past 14 years. They were the pioneers of value retail in India by launching 'MG'. MG offers complete range of value-for-money products through best deals throughout the year to its customers. MG is present in more than 45 cities across the country. The company has continuously striven to improve its sourcing to make this value retail business more profitable.

MG: THE BASKET OF BRANDS

The brands available on the stores are divided in two categories i.e. MG private brands and company brands. Of the total business 65% contribution is by the private brands, the rest of 35% of the business comes from the company brands that are primarily licensed brands. MG brands are operational with 143 stores out of which 130 stores in small format i.e. 1000 to 5000 sq ft, 5 stores in large format i.e. 5000 to 60000 sq ft. and 8 franchises in small format category. Each brand of the MG basket deals with different segments with variety of merchandises. The company has interestingly maintained identity of each brand by its well planned, thoroughly analyzed, and tightly co-ordinated sourcing activities. Each brand is differentiated by the fabric utilized in making the garment. The company has fixed the fabric quality for each brand and also has tied up with couple of Mills for the supply of such fabric. The company is also sourcing imported fabrics as per the requirement of the brands. Even the domestic i.e. locally made fabrics are used to suit the price points offered in the brand. Moreover, each brand has fixed price range for sourcing its merchandise.

The quality parameters for the most premium and the fair price brands remain the same. The vendors for all the brands are controlled by a centralized sourcing team. The merchandiser has a strong role in decisions of fabric to be used in garments, the fit, styling, packaging and so on. The software assists the merchandiser by providing information about the buying patterns of the customers and forecasting future trends.

MG: SOURCING

MG completely out-sources its private label range of garments. The vendors are required to purchase the fabrics on behalf of the company and manufacture garments as specified. The costing is done on F.O.B basis. This strategy eliminates the extra cost involved in rejections of the garments or wastages in fabrics/trims/packing materials during the production process. As the fresh lots are picked up by the company and the seconds and rejects at the production levels are borne by the vendor.

The production team is centralized and handles all the vendors manufacturing for private label brands. The planning with the merchandisers is done on quarterly basis. The requirements are handed over to the production team by each merchandiser with detailed production plan including the quantities, expected delivery dates, technicalities of the garments i.e. size ratios, fit to follow, merchandizing of the garments, packing and distribution instructions and so on. The production team loads the plan with suitable vendor. The responsibility of maintaining quality of the garments, meeting delivery dates with in-full quantities, lies with the production team. In case of any major rejections, joint decision is taken by the quality team and the merchandiser based on the commercial decisions, discounts offered by the vendor and the relation with that vendor.

MG: VENDOR MANAGEMENT

Since, the entire sourcing is outsourced, MG is very cautious in choosing its vendors. Vendor Assessment is done at a regular interval, considering various important factors for long-term fruitful relations. Deliverable quantities on time, commitments during peak season, quality of the garments, inspection hit rate, accuracy in paper/document work such as packing list, purchase order, inline inspection report etc., material handling, storage facilities, design-development capabilities and financial background are some of the important factors considered while rating the vendor.

Currently, the company has around 35 to 40 regular vendors out of which 7 vendors are booked with a fixed capacity round the year. The company has mutually agreed with these vendors to make up for the losses if the capacities are not utilized fully or partially.

MG: SOURCING HUBS

MG being a value brand, there is a direct association of cost with sourcing. The company sources garments from various domestic markets such as; Bangalore, Tirupur, Ludhiana, Jaipur, Mumbai and Delhi. Bangalore is the strongest sourcing hub from which around 60% of the merchandises are sourced. The important factors considered while selecting a supplier are lead times, control levels, cost levels and location advantages. Bangalore markets are attractive from all the above aspects. The lead times of transportation are eliminated at the production level, control levels are high as the head office and sourcing team is also based in the same city, Bangalore is known for its expertise in garment manufacturing and the suppliers are many in number which brings down the cost with assured quality and top all, MG has strongest presence in southern part of India and primarily in Bangalore and hence Bangalore serves the best option for the company for its sourcing activities.

COMPANY 3 (RD)**ABOUT RD**

RD ranks amongst India's largest and most respected apparel companies. RD entered into the ready-to-wear business in 1986 catering to the men's formal wear market. Today it holds the portfolio of five brands in its kitty catering to various needs of men's wardrobe at various price points.

RD is well equipped with state-of-the-art designing facilities. Their well researched fashion forecasts and design trends helps in providing them the cutting edge design solutions of international standards. They are present across India and Middle East with their exclusive brand stores and multi brand outlets.

RD: BASKET OF BRANDS AND SOURCING

RD is present in the market with 5 different brands from premium to popular price segment. It has its own in house manufacturing facility for fabrics as well as for garments. However, this facility is not available for all the brands of their basket. The popular price brand is completely outsourced while one of the brands in premium segment having formal shirting range is exclusively made at their own manufacturing facility. The other premium brand having fashion and club wear are partly manufactured in-house and partly outsourced. The decision of outsourcing or making in-house is taken on the basis of profit center orientation. The styles that are more production friendly and require control over quality and lead times are made in-house. Whereas, fashion garments having smaller lots and require control of costs are outsourced with stringent quality standards. The in-house manufacturing unit provides garmenting facilities to other national as well as international brands also, to spread the risk.

With multiregional agreements among south Asian countries, India has opened up zero duty market access for selling garments from Bangladesh and so as RD. RD has developed their base in Bangladesh, for manufacturing garments from the fabric imported from China. This showed them excellent results in-terms of economics, as the total cost of the garments even after considering logistics and other costs, came down to 75% of the cost otherwise if manufactured in India. But on the other side, the team based at Bangladesh is facing tremendous problems in-terms of delivery commitments, lead times and maintaining control over the entire process.

STRATEGIC OBSERVATIONS

From the above cases and literature study, four key areas influencing decisions have been arrived. They are i. Supply Location ii. Supply channel iii. Firm Characteristics in-terms of product requirements and organization philosophy iv. Supplier Performance (Refer annexure – 1)

SUPPLY LOCATION

It was observed that, supply location is an important decision to be made which has direct influence on cost, quality and variety of the garments. However, certain products need specialized skills on the part of manufacturers, in such scenario other factors like cost and convenience take back seat. It was also observed that along with the product, convenience in the operation is also looked at while taking supply location decision. Considering Indian men's shirting garment industry domestically, Bangalore is the primary hub for manufacturing followed by Mumbai, Delhi, Ahmedabad and few places in southern part of India. However, with multiregional agreements, Bangladesh and Shrilanka are also prime sourcing hubs in the current. Shrilanka is considered to generate fine quality goods as compared to Bangladesh (names of persons quoting this statement are disguised upon request).

SUPPLY CHANNEL

The decision of supply channel is also an important decision in sourcing activities. An organization has different options to choose from, such as own manufacturing, manufacturing through intermediaries or even outright purchase. In outright purchase, the supplier purchases all the raw material on behalf of the brand/retailer, manufactures garments and in return charges an agreed percentage of margins since all investments are made by him. They also fix the cost

of raw material, suppliers of the raw materials and indicate the quantity to be manufactured. Here both the parties work on transparent basis as the fabric rates, trims and packing material rates are negotiated by the retailer/brand and only the manufacturing part is done by the supplier. The outright purchasing is much more beneficial in the current trend of buying where the volumes are low and turnaround time is shortened. There is zero or marginal cost of investment required, the retailer has no liability to take rejections or surplus and the manpower hired is much lesser as most of the work is outsourced. However, since the entire business of a retailer is dependent on the garment manufacturer, it becomes imperative for the retailer to establish and maintain good relations with suppliers. Also the control on the production is largely with the garment manufacturer. There are high chances of delivery dates being jeopardized and production not up to the required quality as mentioned during interviews with practitioners.

Job working or subcontracting is a middle way of in-house manufacturing and outright purchase where a retailer can have a higher control without involvement of huge capital. Here the company procures the major component of raw materials such as fabrics and some of the important branded trims being the major determinant of a good quality. Also the rates are best negotiated since the quantities involved are huge due to single purchasing window. The company has higher control on the processes and thus on quality. Moreover, the capacity is bought out for a season or round the year. A contract agreement is made between company and Manufacturer where the company assures the manufacturer to feed their factory as per the agreed capacity for a specified period and so the risk of capacity being sold out to someone else is eliminated. This happens mostly during the festive season where all players try to en-cash the opportunity of sales. However this method also has some disadvantages. The retailer has to make investment by purchasing raw materials and a large volume of inventory is carried on till the completion of the manufacturing process. Also it is most likely that the left over inventory, or rejected raw material during the process of conversion are to be borne by the company and as a result higher percentage of working capital gets blocked in inventory of raw materials rejections, surplus and other leftovers. Own manufacturing allows for strict quality maintenance, timely deliveries and high control over operations. However, it was observed that companies are manufacturing for other national international brands as well to avoid all eggs in one basket situation.

FIRM CHARACTERISTICS

Every firm will differ in their product requirements. Price points, Size of the order, fashion or innovation required in the garments, quality standards are key points influencing sourcing decision. Ideal sourcing practices and suitable sourcing practices will be based on product requirements and organization characteristics. Philosophy of the organization with respect to target segment, image, pricing, quality, stakeholders commitments, volume of the brand, relations with suppliers, number of outlets and growth prospects are some of the factors that will have an impact on sourcing decision.

SUPPLIER PERFORMANCE

Supplier or Vendor is the active contributor in sourcing activities. Hence, supplier performance is of prime importance while jotting down on a particular supplier. Most of the companies today who are involved in outsourcing have supplier performance system. The performance evaluated into two broad categories i.) Core factors ii) Supportive factors. Core factors consist of lead time, cost, quality, and on-time in-full deliveries, where as supportive factors takes into consideration understanding of the product, transparency, merchandising and sampling support, smooth relations, good atmosphere, trust and ethics, infrastructure and capacities, terms and conditions, credibility of the vendor and scope for development.

CONCLUSION

Textile and apparel is one of the most promising industries across the globe. It is more of a buyer driven industry unlike product driven industries. The success of the industry highly lies in the hands of its supply chain and various stake holders associated to that supply chain. Apparel is the end product of a long chain starting from fiber to yarn to fabric and then to garments. Numbers of operations are involved with variety of parties to enable the end product reach the consumer

The task of apparel sourcing is very complicated due to the tasks involved and the effects of seasons on the salability of the merchandise. Handling the entire task manually calls for a great co-ordination and understanding amongst all the parties involved including the management with dynamic and prioritized approach as the situation demands. Various options have been developed to manage smooth flow of merchandise on the retail floor. Many retailers have started making a choice between taking or making of fabric in advance and then create design. Many a times the core range is well planned in advance and the fillers are taken from stock fabrics as top ups. Many companies do not get into the hassle of managing the fabrics and prefer an option of outright purchase of the garments from the factories with greater control on fabric and style selection and quality of the garment with the manufacturer.

A new trend of global sourcing is observed in India with opening up of multinational market regions. Bangladesh, Sri Lanka and Nepal are getting popularity in Indian retailers for apparel sourcing. This has offered a baggage of opportunities with regard to lower labor costs and innovative products along with risks associated with the loyalty of the global supplier. It is also observed that the offshore suppliers are distributed geographically, and high percentage of them are with little infrastructure, hence the operational costs increases if the lot size are smaller. The cultural differences lead to lack of confidence and result in to a huge transparency gap. Moreover, As compared to domestic suppliers, there is a lack of documented accountability and record of communication for future references. However, the global sourcing is fairly cost competitive, and the environment is highly dynamic³.

SCOPE FOR FUTHER RESEARCH

The present paper draws down various factors influencing the sourcing decisions by Indian retailers. These factors can be further researched for their importance and priority in the decision making process. Also one set of factors can be further analyzed in relation to other set of factors. Such as firms concentrating on cost will have different priorities while taking a sourcing decision as compared to firm which is concentrating on quality or responsiveness.

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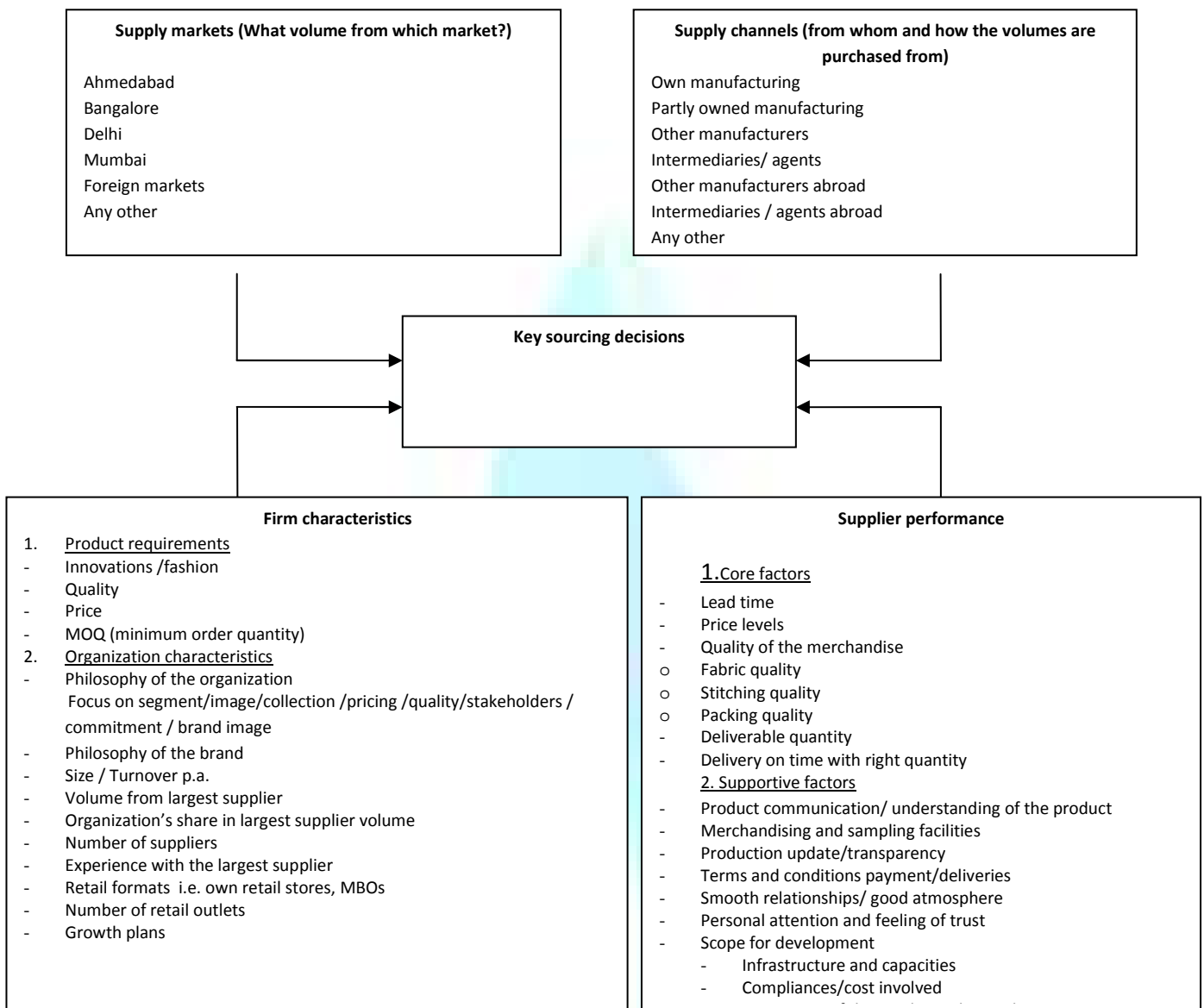
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ANNEXURE

ANNEXURE – I KEY STRATEGIC FACTORS IN APPAREL SOURCING DECISIONS



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