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A Review

Evolution of WTO and its impact on Indian Textiles Industry

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■ **ABSTRACT :** In today's world, globalization and technological developments have made it easier to exchange views, ideas, culture, goods and services which have brought global harmony among the nations. International trade is one of the aspects of globalization which gives an opportunity to the consumers and countries to be exposed to new market and product with least hindrance. Industrialization not only led to mass production but also necessitated trade beyond nation's boundaries for consumption of manufactured goods. Earlier, developed countries had dominance over the world economy and so, to liberalize the global trading system GATT was established and consequently the trade of developing countries rose. This became competitive to the trade of developed nations, so, in order to protect the domestic industries, they took certain protective measures on trade which showed violation of GATT rules. So, in 1995, WTO, an international organization, was established to regulate the international trade with the basic principles of non-discrimination, transparency, open and predictable trade. Prior to the advent of WTO, besides the unfavourable international trade policies, the political instability in India hindered the growth of the textile sector. The establishment of WTO led to the liberalized trade among the member nations. It provided special and differential treatment for developing and less developed countries and introduced agreements like AOA, ATC, TRIPs, TRIMs, SPS, etc. As a result, the Indian textile industry experienced a considerable change in the trading pattern and structure. The quantitative restrictions were phased out, GIs were introduced, inflow of FDI increased under the basic agreements like ATC, TRIPS, TRIMS, respectively. All these have positive impacts on growth of the textile sector. In the year 2006-07, India ranked 7th in the export of Textiles and 6th in the export of Clothing globally, while by 2013-14, the ranks were improved to 3rd and 4th, respectively. The initiatives were taken not only by the private sector but the government also to make this industry capable of achieving the international platform.

■ **KEY WORDS:** WTO, International trade, Export, Import, Textile, Clothing

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In the present world of globalization and technological developments when it is easier to exchange views, ideas, culture, goods and services; global harmony has been enhanced among the nations. International trade is one of the aspects of globalization and an important factor of any nation's growth as it gives an opportunity to the consumers and countries to be exposed to new market and product with least hindrance. In most countries, it represents a significant share of Gross Domestic Product (GDP). Textiles and clothing industry is one of the important sectors of international trade. It not only contributes to employment in developed countries but also hold significant opportunities for developing ones (Anonymous, 1999 and Naumann, 2006).

Since ancient times, trade between civilizations located far apart in different continents had been established which is evident from evidences collected from excavation sites. One of the evidence from history is China silk route, which was used to trade various commodities like silk, wool and cotton textiles; spices, wine, olives, tea, rice and silver, iron, rugs, carpets, ivory, horns, Chinese paper, etc. through which Indian goods were also popular worldwide (Mark, 2014). The Indian textiles were famous for intricately designed, high quality, graceful but cheap fabrics which when traded to European markets threatened their domestic industries. As a result, their government levied high taxes to the Indian imports which negatively affected the export from India and thus left the artisans unemployed and the skill gradually faded. Due to manual manufacturing processes and lack of proper transportation limited the quantity of goods in trade during ancient times.

During mid of 18th century through whole 19th century, when industrialization and technological advancement were at peak, gave rise to the trade expansion and widespread economic development which led to the rapid growth and development in many countries. A steady flow of innovations brought new and cheaper industrial goods to the market and sharply reduced communication and transportation costs. These new opportunities attracted foreign investments and immigrants which accelerated the integration of markets on a global scale. But with the spread of industrialization competition also increased among the industrial sectors of the European countries. Simultaneously, in India, the commencement of spinning and weaving mills in 1856 brought a turning point in Indian cotton industry which prospered until 1870s when the country witnessed several socio-economic problems, disease outbreaks and technological backwardness which led to restricted growth of the Indian cotton industry and thus trade till World War I. Thereafter in the 20th century, gradual decline was observed the almost free trade and it was collapsed during the World War I.

In between 1914-1945 two World Wars took place; they led to the mass destruction of manpower and resources of the world which affected the trade terrifically. Major industrialized nations like European nations started imposing tariff barriers and non-tariff barriers which restrained the trade among world's nations. Impositions of trade barrier curtailed trade across the nations and affected the world's economy greatly and increased the chances of other devastating world wars. So to handle these situations a provisional agreement was established in 1948 to govern the trade around the world, it remain in action for 47 years and thereafter was replaced by a structured organization known as World Trade Organization (WTO) in 1995.

Agreements for textiles and clothing under GATT:

After the world wars, several international measures were undertaken to liberalize trade between the nations. So in 1944, the United Nations Monetary and Financial Conference were held which concluded with establishment of International Monetary Fund, International Bank for Reconstruction and Development (World Bank) and with the proposal of an International Trade Organization (ITO). The establishment of ITO could not take place, so in 1948, a provisional agreement entitled as General Agreement on Tariffs and Trade (GATT) was entered into force to regulate to international trade. Initially there were 23 members which increased to 128 members in 1994. There were eight rounds of negotiation under the GATT, which reduced tariffs and struggled to produce rules to govern international trade. Most of the round dealt with tariff reductions only, but as tariff came down, non-tariff barriers went up. The liberal and non-discriminatory character of trade that was enshrined in the GATT had never been followed in case of trade in textiles and clothing. The availability of cheap labour and natural raw material had made textiles and clothing sector as a comparative advantage for developing countries since past.

Under GATT, three trade agreements regarding textiles and clothing were enforced *viz*., STA, LTA and MFA through which developed nations tried to restrict the textiles and clothing trade from developing nations to protect their domestic markets. Short-term arrangement (STA) was the first institutionalized protectionism concluded in July 1961 for controlling imports of cotton textiles from the developing countries. STA remained for few months and it was replaced by LTA (Long Term Arrangement) in February 1962. Under LTA, quantitative restriction was allowed only when the importing country would face the situation of market disruption and these restrictions could be imposed unilaterally. So the developed countries were allowed to enforce non tariff barriers on imports from less developed countries. These restrictions caused actual and potential market disruptions. Thus LTA did not follow the main principles of GATT, despite that it was negotiated under GATT. LTA existed for 12 years and was replaced by Multifibre Arrangements in 1975.

LTA only controlled the imports of cotton textiles. During the tenure of LTA, less developed countries (LDCs) started to use man-made fibres particularly polyester and acrylic. In spite of strong technological base, textile industry of developed countries faced high and rising unemployment rates because this industry was labour intensive, whereas the developing countries performed well due to the abundant cheap labour. Therefore, to control trade of textiles and clothing of man-made fibres including silk, wool, linen, ramie, jute and their blends with man-made from LDCs, a new and broader agreement was formulated which was known as Multifibre Agreement which became effective from 1 January 1974. This agreement had four term (MFA-I, MFA-II, MFA-III, MFA-IV) and expired in 1991.

WTO and agreement on textiles and clothing :

The economic recession in the 1970s and early 1980s, compelled the government to device other form of protection for sectors facing foreign competition. High rates of unemployment and constant factory closures in Western Europe and North America undermined GATT's credibility and effectiveness. By the early 1980s, the world trade became more complex and important. GATT was no longer, as relevant to the complexities of world trade as it has been in 1940s. So a need of structured body which can handle the increasing complexities of the trade was felt. The Uruguay Round was the last round under GATT which led to the creation of the World Trade Organization, with GATT remaining as an integral part of the WTO agreements. The main concerned areas included agriculture, textiles and clothing, TRIPS (Trade Related aspect of Intellectual Property Rights), TRIMs (Trade Related Investment Measures), GATS (General Agreements on Trade and Services). In January 1995, WTO was established as an international regulatory body for trade which works on the main principle of non-discrimination, transparency, more open and predictable trade with special treatment for developing countries.

In 1995, the ATC took over the GATT's Multifibre Arrangement and resulted in phasing out of the import quota from the textile and clothing goods. This agreement provided a great relief to the textile exports of developing countries. It increased their growth in international market. Phasing out of quota, integrated the textiles and clothing sector in the main GATT rules. This integration took over 10 years in four different stages (Table 1). So in 2005, complete phasing out of MFA took place with the termination of ATC. With the termination of the Agreement on Textiles and Clothing (ATC) at the end of December 2004, all textiles and clothing products were fully subject to the basic rules of the World Trade Organization (WTO, 2007 a and b, 2011 a and b and 2012).

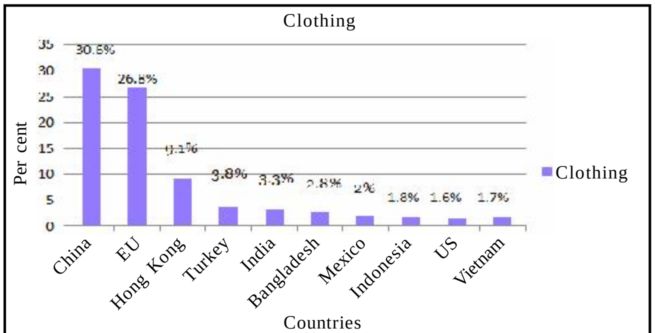
Table 1 : Integration of textiles and clothing into the rules of GATT 1994/phasing out of MFA

Stages	Percentage of products to be brought under GATT (including removal of any quotas)
Stage 1: 1 Jan 1995 (to 31 Dec 1997)	16% (minimum, taking 1990 imports as base)
Stage 2: 1 Jan 1998 (to 31 Dec 2001)	17%
Stage 3 : 1 Jan 2002 (to 31 Dec 2004)	18%
Stage 4 : 1 Jan 2005 >Full integration into GATT (and final elimination of quotas) >Agreement on Textiles and Clothing terminates	49% (maximum)

Impact of WTO on textile industry :

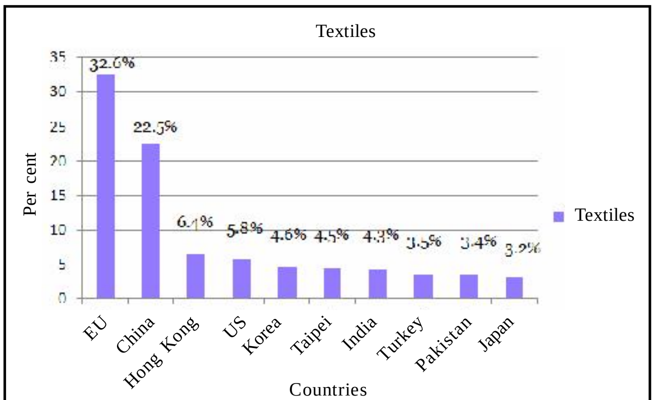
WTO initiated with phasing out of Multifibre Agreement and implementation of Agreement on textiles and clothing. ATC permitted the progressive removal of import quotas established under MFA and the consolidation of textiles and clothing into the multilateral trading system after December 2005. The removal of quotas has offered the buyers an alternative to source from the most efficient and cost effective suppliers and countries, thus opening the door of rigorous global competition driven by low costs and new legislation. Post ATC, it was perceived that the developing countries would gain boost in textile exports and global textile base will be shifted to Asia and India. Developed countries' exports declined from 52.2% share in 1990 to 37.8 % in 2002 and that of developing countries increased from 47.8% to 62.2% in the same period (WTO, 2016).

Table 2 : Major players of the world (2006-07)	
Textiles	Clothing
Major Textile Exporter-EU followed by China	Major Clothing Exporter-China, EU
Major Textile Importer- EU followed by USA	Major Clothing Importer- EU followed by USA



Source: International Trade Statistics 2007, WTO

Fig. 1 : World's major exporter of Clothing (for the year 2006)



Source: International Trade Statistics 2007, WTO

Fig. 2 : World's major exporter of Textiles (for the year 2006)

Indian textile and clothing exports :

India ranked 7th in the export of textiles while 5th in that of clothing during the year 2006-07. Two third of India's export were marketed to USA and EU and thus the Indian export of textile and clothing to these markets are highly influenced by their economic status as well as world's exports to these countries. Other destinations were Canada, UAE, Japan, Saudi Arabia, Republic of Korea, Bangladesh, Turkey etc. Since the return of normal trading rules in 2005, when the Multi-fibre Arrangement quota system ended, world trade in textiles and clothing has increased by more than 68 per cent, more or less at the same pace as the world trade in manufactures. Indian T&C export registered robust of 25% in 2005-2006. This growth continued at 9.28%for 2006-07. This growth rate was reduced to just 2.76% in 2006-08 due to strong appreciation of Indian rupee against dollar. Abolition of MFA quota in 2005 was a great opportunity, but India lacked behind countries, such as China, Bangladesh, Taiwan, South Korea, Vietnam in reaping the potential benefits in world markets because of inadequate advanced preparations in terms of inputs and investments therefore the competitors of having comparative advantage of good infrastructure, organized sector, duty free access of foreign investor and low labour cost.

Today, developing economies and LDCs contribute to almost 70 per cent of world exports of textiles and clothing.

Impact of WTO agenda on textile and clothing trade:

The last Uruguay round (1984-1994) of GATT led the establishment of WTO in 1995 along with many important agreements and discussions on trade related subjects for free conduct of international trade. TRIPs, TRIMs and TBT are the few topics which have impact on the textile and clothing trade of the world.

– TRIPs (Trade related intellectual property rights)
– TRIMs (Trade related investment measures)
– TBT(Technical barrier to trade)

Trade related intellectual property rights:

TRIPs agreement brings common international rules for the protection of intellectual property. It establishes minimum levels of protection that each government has to give to the intellectual property of fellow WTO members (World Intellectual Property Organization).

A section under TRIPs is the protection through Geographical Indications (GIs), which acts as a mechanism that helps producers differentiate their products from competing products in the market and enables producers to build a reputation and goodwill around their products that will fetch a premium price and also enhance territorial development. In textiles and handicrafts, many arts and articles are registered under GI (eg: Phulkari of Punjab, Pochampalli ikat from Andhra Pradesh, Chanderi fabric of M.P., etc.) which are earning benefits not only in exports but in domestic markets also.

Trade related investment measures:

Most developing countries imposed obligations like use of specified percentage of locally produced raw material or components, local equity requirements, export performance and control on imports requiring foreign investors to use domestic supplies. Agreement on TRIMS acted on the removal of such protective tariffs which restricted market access to a foreign industry to invest in another country. This facilitates foreign investment across international frontiers. In Indian textile industry, 100% FDI was allowed under automatic route. The effect under TRIMS was that the FDI increased at higher rates soon the MFA phased out- the investments in 2004-05 which were Rs. 1.97 bn rose by 110.65% to Rs. 4.15 bn in 2005-06 and similarly, FDI in 2012-13 was $ 103.89 mn and rose to $ 198.86 mn in 2013-14 *i.e.* by 91.41%.

Technical barrier to trade:

The TBT Agreement was carefully designed so that it helps WTO members distinguish between legitimate and protectionist motivations for TBT measures.

It ensures that regulations, standards, and testing and certification procedures do not create unnecessary barriers to trade but recognizes members' right to take measures to protect human, animal or plant life or health, the environment and consumers, etc.Trade/export was impacted under TBT by basically for two reasons-

– Increased costs to be incurred to make the domestic product conform to foreign standards

– The cost to be incurred for certification procedures and difficulty in proving product conformity

Thus it has become a challenge for the Indian SMEs (Small and Medium Enterprises) to comply with such high costs.

Impact of brexit on Indian textile and clothing industry :

Brexit is the withdrawal of the United Kingdom (UK) from the European Union (EU). This occurs after the historical poll that chose 'Brexit' by 52% to 48%. This would have a major impact on various worlds' economies. Due to devaluation of Britain's Pound, UK has to pay more to the goods and services from EU and US, which will create the situation of inflation in UK. India's rupee is not likely to suffer much from the direct trade impact when it comes to UK but in the near term, it will of course respond to the global risk. According to experts, Brexit would affect manufacturing sector, the textiles and fashion industry is expected to be affected negatively both in UK and across the world. UK is one of the important destinations for Indian export and major exports to the UK are textiles and clothing, followed by machinery and auto ancillaries. With Brexit, the Free Trade Agreement terms may need to be re-evaluated and renegotiate so, this might affect the trade related policies between Indian textile and apparel trade (Tecoya Trend, 2016).

SWOT analysis of Indian Textile Industry :

Strengths :

Acceptability of Indian textiles and garments :

India since centuries is famous worldwide for her unique designs and fineness in textile and diversity in apparels.

Strong raw material base :

India has a wide range of fibre/yarn from natural fibres like cotton/jute, silk and wool to synthetic/man-made fibres like polyester, viscose, nylon and acrylic. India is first in global jute production and has largest cotton producer in the world.

Large production capacity :

In spinning India has 21% of world capacity and in weaving it is 33% of world capacity. In spinning, nearly 90% of production is in the organised sector, which uses the world class technology and has achieved a high level of efficiency in production.

Vast pool of manpower :

India has the second largest population in the world with maximum per cent of young generation in the coming decades. Textile is a labour intensive sector which has constant need for both the skilled and unskilled force. Also, not only men, but women are also engaged in the various small and big activities at household and industrial level.

Long experience with US/EU :

Since many years, US and EU are the major export markets for Indian textile goods. The people have high disposable income as well as taste for the Indian handicrafts.

Self sufficiency :

India is a major exporting country and has very low importing shares as most of the supply chain from textiles to ready-made clothing is located within the country. Majority of imports in textiles take place for re-export or special requirement.

Weakness :

Limitations in infrastructure, scale and production efficiency :

An overall comparison of the infrastructure facilities made by the World Competitiveness Report ranks India 54th among 60 countries surveyed. Most of the other Asian countries that are alternative sourcing destinations for textile and clothing products like China, Malaysia, Hong Kong and Indonesia. They have much better ranking and facilities to offer to the domestic manufacturers. Moreover, the heterogeneous scale (mainly the disintegrated small and medium scale units) also limits the production efficiency.

Powers loom - Decentralized and unorganized:

One of the most important segments of Indian textile industry in terms of fabric production and employment generation is decentralized and unorganized. More than 75% of shuttle looms are obsolete and outdated, out of 23 lakh power-driven looms in the country the population of shuttle-less looms is less than 1.5 lakh and majority of them are second hand.

Lack of proper processing units :

Around 2,400 processing units in the country are power operated while 7,600 units are hand operated. Only around 220 out of 2,400 power processing units are organized large scale units.

Reformation of labour reforms :

The flexibility in labour laws is needed inorder to meet the demand of labour intensive sections like garmenting, to permit increase in the weekly working hours limit subjected to adequate compensation so as to meet peak season requirements of customers as well as compensation for lower labour productivity.

Focus of young consumers on brands and labels:

Branding refers to creating a unique name and image for a product in the consumer's mind and assuring that the customer can expect certain basic qualities from the products and services, and it diffrentiates the oûering from that of other similar products. Presently, branded ready to wear clothing have a 24% share in the garment market in India, while unbranded garments have around 50% market share. The price of the product sold to the consumer in export markets is 5-10 times higher than the ex-factory price product and Indian apparel exporters are essentially suppliers to the global brands, thus losing significant amount of export earnings.

Opportunities :

Focus of young consumers on brands and labels :

The shift in preference to branded products has opened options for domestic manufacturers. Through branding of Indian goods better possibilities to sustain the markets in domestic and international arena.

Increasing purchasing power :

India is a fast growing economy and thus with an increase in the purchasing power of mass consumers. Also the changing life style is opening opportunities for not only the domestic manufacturers but also for the foreign investors.

Emerging organized retailing :

Organized retailing is driving growth in the sector which is enhancing the value chain of textile products. As a part, there is entry of world renowned chain stores and international brands into Indian retail markets.

Potential destination for FDI :

India has been announced as the largest destination for foreign investors due to its relatively lower wages, special investment privileges such as tax exemptions, etc. This offers possibility of expanding business to the global brands into Indian retail markets.

Changing clothing trends :

There is a change in clothing trends; among Indian consumers from need based to specific and occasional wear like sportswear, gym wear, leisure wear etc. due to high disposable incomes, global movement across borders and changing occupations. Also, the demand for ready-made garment is spreading from urban to semi urban and rural areas.

Lagging behind of major competitors :

The declining growth or stagnation that China is currently facing in world markets and the compliance issues in Bangladesh has provided yet another opportunity to India against its major competitors in apparel sector.

Unique design skills of artisans from small scale sector :

India has diversity in culture and arts, and artisans from small scale sector are excelling in their regional crafts and indigenous skills. Amalgamation of the artisans and their craft in mainstream can be explored and enhanced. This will not only uplift their status but will also provide the sector with unique designs, products and technologies.

Threats :

Variety of non-tariff barriers :

Certain non tariff barriers like compliance to ecological standards, voluntary export restraints, subsidiaries, anti dumping rules, etc. are posing threats especially to small and medium scale industries due to cost and time factor involved.

Higher international competition :

Post phasing out period has not opened opportunities for the developing countries but at the same time competition among them has also increased. This is a challenge for India as its major section is unorganized and decentralized. Moreover, SMEs are not able enough to face such tough competition owing to obsolete infrastructure and technology blocks.

Threat to domestic companies due to FDIs :

The established foreign companies usually have more advanced technologies. Thus their production rate is high and supply chain is comparatively more efficient. This economically contributes to the host nation but simultaneously threatens the credibility of indigenous domestic markets.

Threats to artisans despite of Geographical Indications:

Inspite of protection of goods under GIs, there have been cases of imitation which are sold in comparatively less prices than the original, thus threatening the original art. The artisans are poor lots and less aware of business ethics. Hence they could not afford legal processes for protection of their crafts and business.

Conclusion :

The establishment of WTO has resulted in comparative advantage to developing nations in terms of textiles and apparel sector. This as an organization has proved more efficient in dealing with the trade policies and regulations in comparison to GATT agreements. The functioning of the principles and policies of WTO resulted in due tariff reductions which mobilized liberalization in terms of market access for goods and services, opportunities for investments and competition among traders. The post ATC quota free environment in textiles has opened the door for global competition thereby providing platform to the emerging economies. India being one of them had experienced ample scope and potential like growing economy, suitable investment market, abundant raw material, high manpower etc. to lead the sector ahead of different nations. But factors like lack of infrastructure and technology upgradation, decentralization, threats due to non tariff barriers, etc. have been big hurdles on the way. In recent years, the launch of the concept of Make-In-India, Digital India, Skill India launched by government may boost infrastructure and manpower quality and quality to bear fruits from available opportunities and take up challenges effectively for pursuing growth in textile sector.

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