

November 2015

The Observatory Mirror



ISED SMALL ENTERPRISE OBSERVATORY

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Global Recession?
German SME Story
'Hubanomics': the New Catchword
ILO's alarm call
'New economy', the Master
India's *Udyog Aadhar*
UN: "Go the SME way or Perish"



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Dear Friends,

As the latest Report of the ILO indicates, a large number of people, around the world, are getting unemployed and marginalized through the worst ever effects of a global economic crisis. Providing income opportunities is the only answer. There is no magic wand; people's action (out of self-interest) need to be triggered. Micro, small and medium enterprises as a good solution, makes both good economics and good politics.

This issue of the Observatory Mirror has been devoted to a discussion on the latest global scene of enterprise and entrepreneurship. Of course, an understanding of the global scene is too crucial for us in India to take stock of the country's strengths and opportunities. ISED has a comprehensive plan in order to serve and mobilize knowledge and action in favour of the above cause. But, for this work to continue, we need the support of all who believe us.

In its 28th year of service to enterprise development, ISED is a vocal and respected institution in its constituency. While its motto of "sustainable development through enterprise" is noble and respected, the challenges are huge and ever- growing. Whether in Africa, India, or Europe, the entrepreneur at the bottom of the pyramid"speaks the same language. Therefore, ISED is keen to reach all of them through this Observatory Mirror, and to work for a global partnership.

SMEs and livelihoods are dear to the hearts of most of us, because, as we know, it is the last resort of the person at the margin who wants to "do something" of his own. To support a good cause is a basic human instinct. Yes, we badly need your helping hand, in the form of resources, ideas, and moral support. Both the Institute and the Observatory seek your donations, however small it may be, to sustain the variety of services that we render to the cause.

A handwritten signature in black ink, appearing to read 'P.M. Mathew'.

P.M Mathew

Global Recession.....?

A recent study by the ISED, brings out the tumultuous global scene relating to development of SMEs. The global institutions such as the UNIDO, ILO, WTO, UNCTAD, ESCAP, ADB and UNDP, present a mixed picture of the global economy. On the one hand, the Economist, London, on September 9, 2015, forecasted a global recession. The prediction is that a global recession is the “most likely” outcome with a 55% probability. While the economy catches trouble, the last resort providing some leeway to the common man is the SMEs, The ISED study, being brought out as Discussion Paper, will be released in December.

This issue of the Observatory Mirror is devoted to focus on India's urgent importance relating to enterprise development, against the tumultuous global scene. Global development relating to MSMEs gives a very interesting story as in November.

On the other side, according to, what the Global Entrepreneurship Monitor (GEM), the African economies report the highest perception of opportunities and perceived skills to act entrepreneurially with the lowest fear of failure rates. European Union economies are less optimistic about entrepreneurial opportunities and expressed the lowest perception globally. North America is more innovative than the rest of the world. Asia and Oceania display high product innovation but with modest orientation to new markets.

Exports Fall: SMEs Under Global Turbulence

The latest analysis of on global exports and the role of SMEs, bring out some interesting results. It is understandable that small and medium enterprises are particularly affected by market turbulence under the recent global crisis. The problems are reflected in reduced demand, difficult access to export markets and particularly capital markets.

The latest evidences on India's exports show a grim picture for labour-intensive sectors such as leather, textiles, jewellery, and handicrafts. These are all strong indications, but are not reasons for panic. It emphasises the need for innovation at all costs. But, if at all innovation has to take place, a change in the mindset of SMEs is crucial. A large number of Indian SMEs still believe that, the country's huge market will protect them anyway. Policy makers need to do better homework, and must try to enhance export sensitiveness among entrepreneurs.

Germany's SME Story: Lessons for India

A recent study by the International Monetary Fund (IMF, 2015) has summarised India's challenges on the export front, in relation to some critical areas. Structural transformation depends not only on how much countries export, but also on what they export and with whom they trade. But, what do the SMEs, who contribute the bulk of India's exports, perceive? This is a critical issue for which a satisfactory answer is still begging.

Some of the recent studies on the German, SMEs,, are illuminating. Latest research at the ISED brings out some striking points that deserve consideration by policy makers in India. The SME-led development of Germany is a unique and highly successful economic phenomenon that could serve as a model to promote trade and industry for emerging India.

SMEs companies are the backbone of the German economy. Some 3.7 million GM companies account for 99% of all German firms, and in 2011, employed 15.5 million people. In 2014 alone SMEs created almost one million new jobs, whereas the big companies cut more than half a million jobs.

The dynamic innovation of SMEs makes this possible: 54% of SMEs created a product or process innovation between 2008 and 2010; the EU average was only 34%. Every year about 90% of patent applications in Germany come from the SMEs.

The impressive GM performance enables Germany to maintain its high position in the head-to-head race for global export champ with much bigger countries like the China and the US.

Emerging India lacks institutional frameworks that support SME trade and investment—in contrast to Germany's comprehensive system of chambers of trade and industry, as well as chambers of crafts that promote SME trade and investment activities at home and abroad. These chambers greatly contribute to the essential role of the SMEs in Germany's economic policies.

Not Globalisation, it is 'Hubonomics' Today

'Hubonomics' is the latest paradigm in the global economy. This new phase of globalisation implies the emergence of hubs that will service the needs of the growing local trade. It is expected to shift how and where we operate and consume. In such a paradigm shift, understanding and managing contradictions is the most difficult change. Today, understanding change, in terms of its various dimensions, is not much of a problem. Time is the crucial variable, and the biggest risk is the delay in taking action. The forthcoming India MSME Report 2015 discusses the paradigm shift and its implications for SME policy in emerging economies.

ILO Warns on Employment Fall

The ILO report, entitled World Employment and Social Outlook - Trends 2015, finds that the global employment outlook will deteriorate in the coming five years. The global employment gap caused by the 2008 crisis continues to widen. The global unemployment is expected to increase by 3 million in 2015 and by a further 8 million in the following four years. An additional 280 million jobs need to be created by 2019 to close the global employment gap caused by the crisis. The youth un-employment rate is practically three times higher than is the case for their adult counterparts.

The ISED Small Enterprise Observatory continues its annual review of the global SME scene on the basis of the ILO Report. According to the ISED Small Enterprise Observatory, the above developments have both opportunities and threats to the SME constituency. On the one hand, there is a potential for the swelling "surplus labour" to be absorbed by the SMEs. But, that would also mean, going by the experience of the past, adding to the ranks of the so-called "necessity entrepreneurs".

India MSME Report 2015 finds Big Challenges Ahead

India Micro Small and Medium Report, the country's exclusive annual source book on micro, small and medium enterprises (MSMEs), being brought out by the ISED, will be released at Mumbai. This eighteenth volume of the Report carries "skills, entrepreneurship, empowerment, and innovation", as its leads.

The year 2015 is marked by India's unique position in the global economy. Though India has been affected on the export front, as this Report of 12 chapters highlights, this is the right time for the country to move forward based on an SME- focused growth strategy.

The Report, at the very outset, outlines nine focal themes. The subsequent chapters examine these focal themes in relation to the present state and prospects of MSMEs in the country. As the leads very well convey, the Report examines the scene relating to start-ups, growth, structural changes, entrepreneurship, finance, public policy and policy institutions, gender, and several other related issues of concern today.

The introduction of the new public policy regime of 'cooperative federalism', implies that the State governments, hereafter, need to do much more home work to Mobilise resources for development the interests of their people. Generating and sustaining a domain knowledge is critical, according to the Report.



ISED Small Enterprise Observatory which brings out this national report has also been supporting the State governments to set up such knowledge base for effective coordination of SME programmes.

An outstanding feature of the Report is its meticulous analysis of global developments in the SME constituency which has never been carried by any other report. Copies of the Report can be ordered in advance from the Observatory's Bookshop (seo@isedonline.org)

"Go the SME Way or Perish": UN Warns Governments

Six years after the global financial crisis, gross domestic product (GDP) growth for a majority of the world economies has shifted to a noticeably lower path compared to pre-crisis levels, notes a recent U.N. document. Major developed economies are highly likely to be entrapped in secular stagnation. Economic growth in South Asia is set to gradually pick up from an estimated 4.9 per cent in 2014 to 5.4 per cent in 2015 and 5.7 per cent in 2016. The recovery will be led by India, which accounts for about 70 per cent of regional output.

The main challenge for policymakers in many countries is to implement fiscal strategies that are more supportive of output growth and employment creation. On the monetary side, access to credit for SMEs will continue to be an essential tool, as they play a significant role in job creation. There is also the need to adequately coordinate monetary and fiscal policies to foster employment creation. On the structural side, policymakers in a number of countries need to create an environment that is more amenable to the creation of businesses and jobs—by streamlining administrative procedures. In addition to macroeconomic policies, specific labour market policies are also required.

ISED Small Enterprise Observatory analyses the latest global consensus on SME development. Read the story in India Micro, Small and Medium Enterprise Report 2015(forthcoming).

ISED Recommendation Gets into Statute

The Union Ministry of Micro Small and Medium Enterprises has come out with the 'Udyog Aadhar Memorandum', which must be filled online by all MSMEs. This is expected to be a move that will simplify registration procedure for entrepreneurs and promote ease of doing business.

ISED Director Dr.P.M.Mathew had originally mooted this idea in 2001, as Member of Dr.S.P.Gupta Committee on Development of Small Enterprises at the Planning Commission. The concept was subsequently pushed through by various issues of the 'India MSME Report', as also by the Institute's Memorandum to the Prime Minister in August 2014.



ISED Small Enterprise Observatory (ISED-SEO)

Call for Membership

ISED-SEO, a dedicated international partnership platform of the ISED, invites membership in the following categories:

- **Small and medium enterprises** • **Corporate sector**
- **Associate organisations** • **Individuals** • **Students**

This call is open until December 31, 2015. More details, please reach us at: Co ordinator, ISED Small Enterprise Observatory, email: seo@isedonline.org

ISED Seeks Global Partnerships

In our global knowledge economy, knowledge divides people into the rich and the poor. The Institute of Small Enterprises and Development invites well-meaning individuals and institutions, around the world, to join our drive for creating opportunities for forward-looking youth, women, and the entrepreneurial poor, especially from the villages, through Knowledge Support Services:

- **Tribute Programme** : Make a donation to the 'Tribute Fund', and we will direct your gift to the area of greatest need. Donate in memory or honour of a loved one.
- **'Make it Happen' Fund** : Success stories of entrepreneurship are created around the world every day. A small annual donation can bring them out through some exciting brief studies or Public Lecture/Seminar of your interest, and which cannot otherwise happen.
- **'A Dollar for the Unemployed' Fund** : ISED contributes to employability enhancement of the youth through in house training, Internships and Apprenticeship opportunities, that equip them to grow in the knowledge economy. Scholarships are offered to a selected number of promising persons every year.
- **ISED Annual Small Enterprise Lecture** : This is a unique annual Lecture Series that brings to light the latest thinking and global experience on SMEs. It happens in various cities of India on a rotation basis.

ISED is a registered non-profit organisation(u/s 12-A of the Income Tax Act). Yes, great things can happen from even a small support. Please email us for any questions/queries you may have: director@isedonline.org

ISED- International Internship Programme

The International Internship Programme in Sustainable Development (IIPSD), a tailored programme meant for those interested in the subject areas of SMEs and private sector development, is open now. Open for candidates from various educational and career backgrounds, this is the Fourth Quarter call for the year 2015. Selected interns in this Quarter may also get the opportunity of participating in the Institute's prestigious Project, 'India MSME Report 2015'. Details, please email us at: director@isedonline.org

ISED-SMALL ENTERPRISE OBSERVATORY EXPRESSION OF INTEREST FOR PARTNERSHIP

The Coordinator,
ISED Small Enterprise Observatory .

Sir,

I am happy to know of the activity spectrum of ISED Small Enterprise Observatory and would like to partner with it in the following manner:

- Membership in Observatory
- Tribute Programme
- 'Make it Happen' Fund
- 'A Dollar for the Un employed' Fund
- ISED Annual Small Enterprise Lecture

Kindly give me more information, and advise me on further steps.

Yours faithfully,

Name & Signature

Note: Please email this format, or make a telephone call, so that the Observatory staff may get in touch with you.

ISED Key Publications Index

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ISED-173	A Directory of Women's Industrial Enterprises in Kerala
ISED-085	A Situational Analysis of Small Industry Associations in India
ISED-022	Aasoothranthinte Puthiya Maanavum Vyavasaya Valkaranavum (Malayalam)
ISED-049	An Approach Paper on Development of Small Enterprises in Kerala
ISED-128	An Evaluative Study on Women's Organisations in Kerala
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ISED-168	Coconut Shell Resources of Kerala Utilisation and Technologies
ISED-075	Collective Approach to Poverty Alleviation in India :A National Study
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ISED-108	Continuity and Change: Dynamics of Economic Transition in a Pre-Industrial Society in North-East India
ISED-100	Craft Entrepreneurship Clinic - Iringalakuada
ISED-167	Craft Entrepreneurship Clinic -Kannur
ISED-130	Craft Entrepreneurship Clinic -Neeleswaram, Ernakulam Dist
ISED-117	Credit Unions and Small Enterprise Finance
ISED-092	Database of the Kerala Economy
ISED-185	Data-base of the Kerala Economy - 2002 and Beyond: ISED Perspectives
ISED-086	Decentralised Planning for Small Enterprise Development: An Experiment at Kalady, Kerala, South India (Report on Local-level Skill Mapping).
ISED-131	Development of a Sericulture Co-operative Network, Kerala : An Evaluation Report.
ISED-065	Development of Small Enterprise Clusters: An Alternative Approach
ISED-105	Development of Small Enterprises: Challenges and Opportunities
ISED-162	Development Theory, Planning and Informalism
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ISED-174	Employment in Women-preferred Industries: A Study on Garment Industry in Kerala, India.
ISED-121	Energy and Green Business: The Way Forward for MSMEs
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ISED-164	Entrepreneurship Development in the Renewable Energy Sub-Sector In Asia: Report of an International Workshop

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ISED-186	Evaluation Report on Co-operative Rural Development Project
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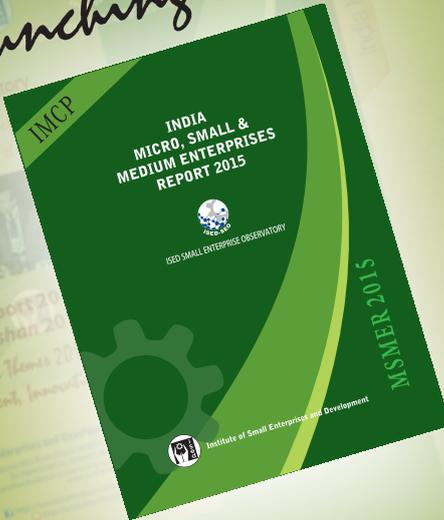
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ISED-006	Yes, the Small is Beautiful

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The Data Products at the ISED Small Enterprise Observatory satisfy the needs, and answers question raised by a wide spectrum of clientele: entrepreneurs, financial institutions , promotional agencies, researchers, policy makers , educational institutions ,academia-----

- Sub sectoral Profiles
- Regional Profiles
- Project Profiles
- MSME Connect
- Data Sets (Generic Set, Sub sectoral Set, Geographical Set)

Launching soon.....



"The work of specialist institutions like ISED is of great relevance to entrepreneurs and policy makers alike....."

Shri. Narendra Modi, Prime Minister of India

"But even in this era of globalization, we live in neighbourhoods and communities. The 'Small Enterprise Observatory' at the ISED and the 'India MSME Report' Series reminds us of that....."

Padmabhushan Mark Tully, veteran Journalist and author.



Institute of Small Enterprises and Development (ISED) is an interdisciplinary Centre with small enterprises as its key constituency. Along with research, advisory services, advocacy, networking, and training, the Institute is an active participant to policy dialogue on small enterprises. The Institute is affiliated to the Indian Association of Social Science Institutions (IASSI), as its Permanent Member.